StaffSavvy

# Core Feature

# Manual

# Contents



# 1. The Basics

## 1.1. Screen sizes

StaffSavvy is designed to work on as many screen sizes and devices as possible. Due to the vast array of devices and screen sizes available, it's not always possible to offer every feature in every situation.

Some features are only available to large screens as they are very difficult to use on small monitors. Please ensure you have your browser window maximised when using the site on a desktop computer.

## 1.2. Glossary

Many of the key phases on the site can be customised as needed to suit your workplace. Below is a list of the terms this guide will use and what they mean.

### 1.2.1. Staff Member

An individual account on the site. This grants the user access to their shifts, training, events and much more. Individuals can have different levels of access to the site (allowed to see/do different things) and also have access to one or more venues.

Common alternatives: crew, colleagues

### 1.2.2. Venues

These are single locations within your business group. They might be shops; coffee stalls, night clubs or nurseries. Each outlet's schedule of shifts is managed separately. Staff have access to one or more venues; granting them access allows them to work at that venue. Staff also have a "home" venue which allows staff to be grouped into teams easily.

Common alternatives: outlets, units, departments, branches, locations, rooms

### 1.2.3. Venue Groups

This is a collection of several venues that operate together. Each ops group can have any combination of venues assigned to it and venues can be in multiple groups.

Many of the reports and shift management functions on the site support viewing and managing as a venue group. This allows you to run multiple venues as a single operational unit.

Common alternatives: regions, ops groups, departments

### 1.2.4. Teams

These are sub-groups of staff. They can combine different venues together. It is used for team building primarily; it does not affect shift schedules or any other part of the staff management.

Common alternatives: squad, group, troop, division

### 1.2.5. Roles

This is how staff are selected for certain shifts; a role comes with certain job requirements the staff member will perform for that shift. Different roles can also be paid different hourly rates.
A staff member can only work a shift if they have been assigned the same role. A duty manager shift can only be worked by a staff member that has been added to the Duty Manager role.
Common alternatives: skills, group, type

### 1.2.6. Levels

A level is the access a staff member has on the site. This dictates what they can see and what they can't on the site. Normally the levels of access mirror your internal levels of seniority within your workplace; staff, team leader, duty manager, venue manager, chief executive.

### 1.2.7. Covershifts

These are simple shifts available for cover; they might be unassigned (extra shifts) or they might be a request from a staff member to cover.

### 1.2.8. Extra Shifts

These are shifts that staff members can take via Available Shifts in their menu. Only staff with the same role as required for the shift and with access to the venue the shift is taking place at, will be able to take the shift. It will also prevent them from taking a shift that breaches hour limits or working in two places at the same time. Additional restrictions can be applied using Shift Ranges and Venue Settings.

### 1.2.9. Offered Shifts

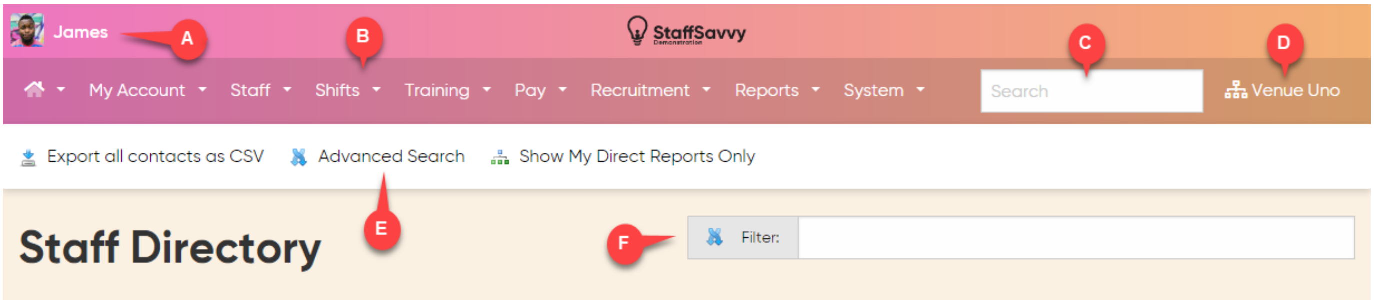
These are extra shifts that staff can offer to work but managers make the final decision on who will work each one.
This is useful for certain situations but we do recommend using roles correctly so that extra shifts can be used most of the time. Offered shifts are manager-intensive and thus limits some of the efficiency savings you can make.

### 1.2.10. Unassigned Shifts

These are empty shifts ready to be assigned by a manager. These cannot be taken by staff themselves and must be manually assigned to staff.

# 1.3. The Navigation




A: Your Details
B: Main Menu
C: Quick Search
D: Venue / Venue Group Selector
E: Actions Menu
F: Page Filter

### 1.3.1. A: Your Details

In this area we'll display your profile image and your name. It allows you to quickly confirm that you are logged in and by clicking on your name will take you directly to your profile page.

### 1.3.2. B: Main Menu

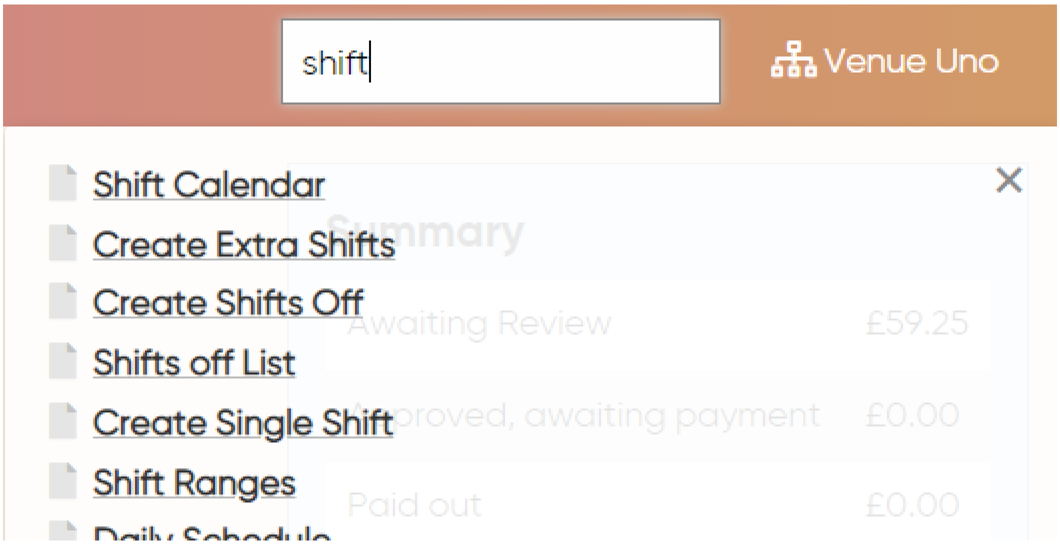
This is constant throughout all pages however it will be customised based on your access level to the system and the size of screen you are using. Some of the larger reports (like the year planner) might vanish if you have your browser window too small or are using a small tablet screen.

### 1.3.3. C: Quick Search

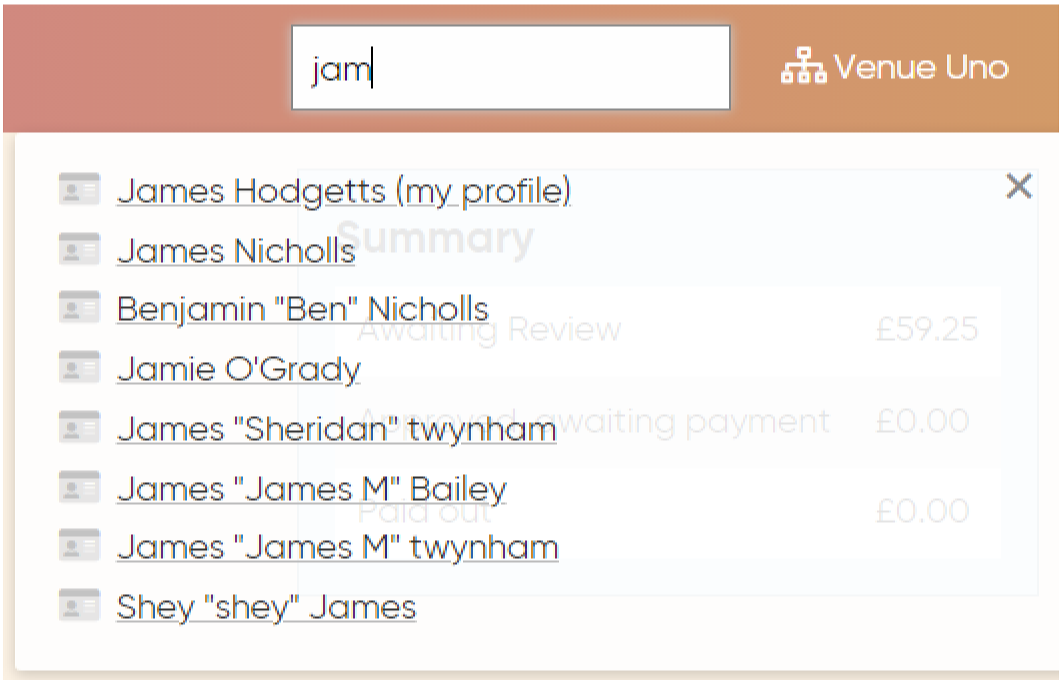
The quick search function is designed to help speed up your navigation and to help you find the page you are looking for quickly and with ease. This is displayed in the menu on all pages and will give quick access to all pages within the menu, staff profiles and assigning options for Roles and Venues.

Simply start to type anything in and the system will aim to give you the best options:



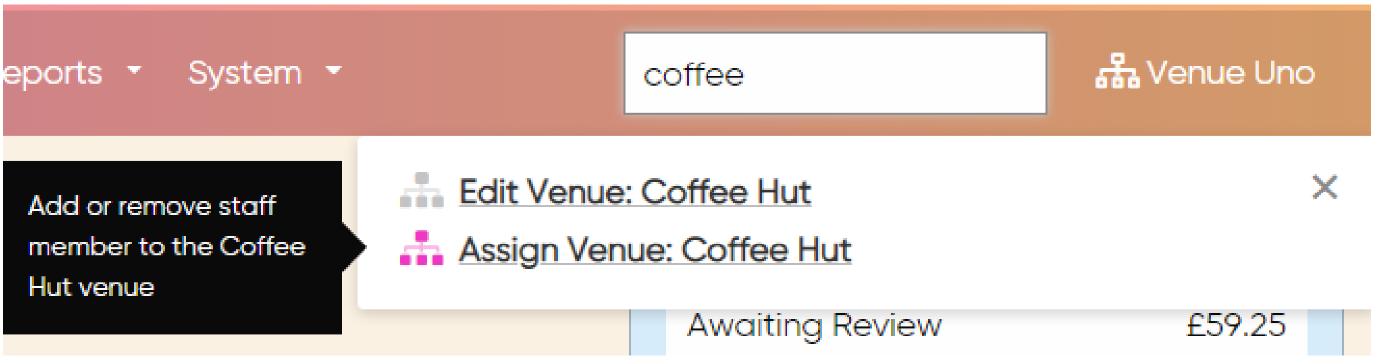

You can also search for staff members:




And go directly to editing a venue, editing a role, assigning staff to a venue or assigning staff to a role.

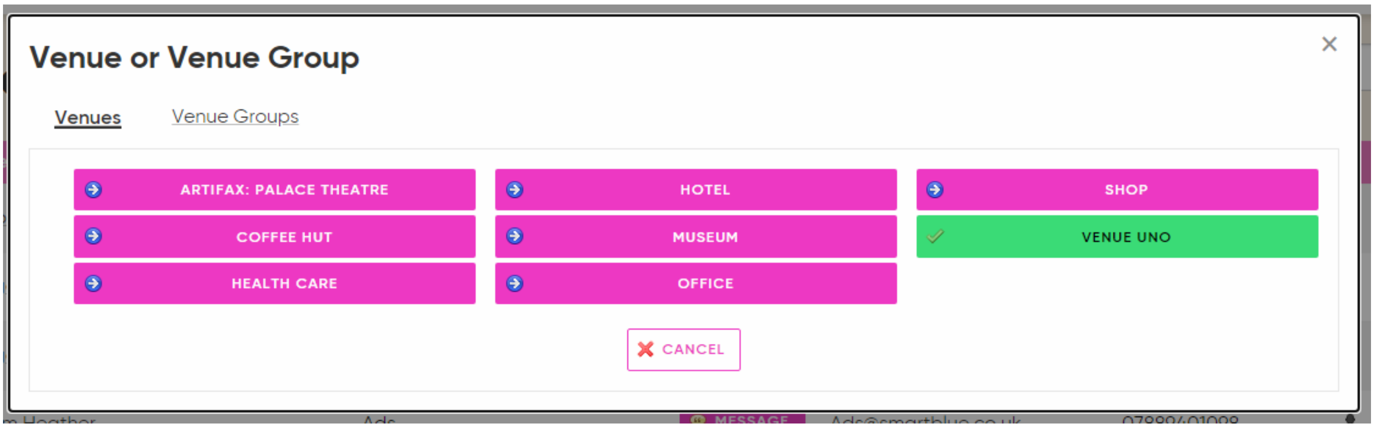
In addition, if you hover over the suggestion, we'll provide a summary to help you choose the right page each time.




### 1.3.4. D: Venue or Venue Group Selector

If you have access to more than one venue then this option will display which venue or venue group you are currently viewing. Clicking on the venue will bring up a selection box where you can choose which venue or group to manage.




At the top of the popup choose Venues or Venue Groups to change between the individual items or the groups of venues. The current venue/group will be highlighted and you can simply click to change to another venue or group.

Only the venues/groups that you have access to will be displayed.

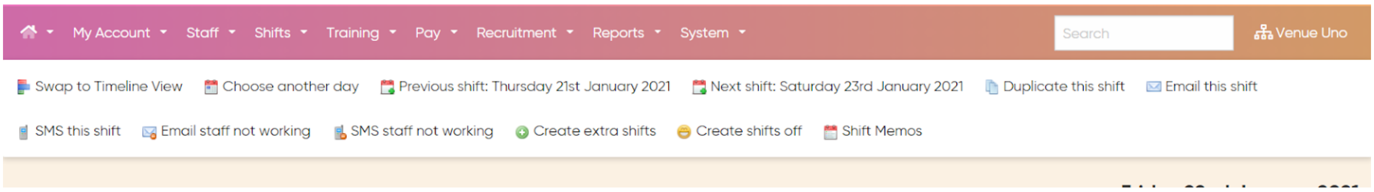
### 1.3.5. E: Actions Menu

This menu is only displayed on some pages; it's always contextual so changes based on the page and record you are looking at.

On some pages it might simply add "Add a new…" and on others there might be many options to do with that profile or record.

It's often where additional options and settings are made available (the actions) as well as links to edit items or view additional reports.

This is an example of the Actions Menu on the manage shifts page; it provides access to different views, options to duplicate shifts, contact staff who are working and quick access to other features.

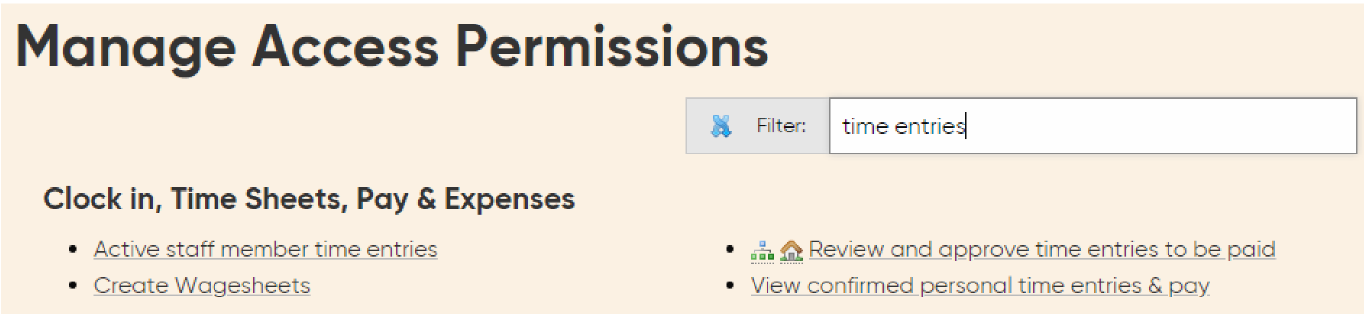



### 1.3.6. F: Page Filter

This allows you to quickly filter the page items to find the record you want, for example on the staff directory, you can type in any part of a staff member's name and the system will filter the staff down to those who match.

Different pages might have additional filter options to assist in finding the right records.

The example below shows the permissions page filter only displaying permissions for time entries:



# 2. Organisation Configuration

## 2.1. Global Settings

You can control a vast array of options for your organisation. These are managed under the System > Configuration > Global Settings.

### 2.1.1. General: Details

- **Entity Name**
  This is the name that we'll include on various parts of the system and should be your legal or trading name.
- **Organisation Week Starts**
  For some reports and views, we need to know the start of the week.
- **Organisation Country**
  To provide national holidays and currency automatically.
- **Default Colour Scheme**
  These allow you to choose the default colour scheme in use on the system. Staff can choose to change this for their accounts, but it will still be used on login/register screens.

### 2.1.2. General: Data Controller

We use this information on the registration screens as part of your default data protection compliance statement. Data protection compliance is your responsibility but we are ready to be compliant as your data processor. We recommend that you add your own data protection compliance statement under the Data Policies: Data Privacy Declarations tab. Your policy should cover all use of private staff data, in this system, in any other systems and offline.

We'll simply display this data controller information in legally required locations so that you can be compliant with various data protection laws. It is your responsibility to keep this information up to date and ensure you comply with local data protection legislation.

In addition, we ask for you to provide a contact email address for those who should be informed of a data breach. We work hard to ensure this doesn't happen in the first place.

### 2.1.3. General: Services

- **SMS**
  SMS messages are used throughout the site for last minute notifications and urgent messages. You can

disable this entire feature here but it will block everything from last minute reminders to evacuation lists.

The SMS feature has costs associated with its use. SMS credits are purchased in packs up front and we'll simply use up the credits as SMS are sent. We won't automatically invoice you for additional credits. You can see the options for SMS credit packs under System > Finance > SMS Credits. This page allows you to purchase additional credits which will be added to your next invoice automatically.

### 2.1.4. Payroll: Calculation Method

This is how the system will manage rounding with reports and exports. It allows you to prioritise accuracy or consistency across reports.

### 2.1.5. Payroll: Services

Each of these services add employee reference fields, account codes, cost codes and more to the site to support the selected payroll service.

For additional information on each of the payroll services please speak to StaffSavvy Support.

### 2.1.6. Payroll: Export Formats

These additional export formats allow you to export wage sheets in different formats for use in other applications or to provide to third parties.

Descriptions on the export formats provide some information on the data they contain and how it will be presented.

For additional information on each of the payroll services please contact StaffSavvy Support.

### 2.1.7. Payroll: Payroll Settings

- **Require NI Number (UK ONLY)**
  This option can require NI Number to be added (and optionally verified by a manager) for the employee's pay to be included in Wage Sheets for payroll. When enabled, anyone without an NI number will be excluded from wage sheet exports. Their hours will be kept on record for when their NI number is provided.
- **Require Employee References**
  Employee references are often their payroll ID or account code used to connect their account in StaffSavvy to their payroll account.
  When enabled, staff without employee references for the payroll services you have enabled will not be included in wage sheets. Their hours will be kept back until all of their required references are provided.

### 2.1.8. Features

This page section allows for many different features to be turned on and off. The change will take place almost instantly and can be changed at any time.

Disabling a feature will not remove any data; it will be retained until the feature is enabled again.

Disabling the recruitment add-on will remove the data stored to assist with data protection laws.

### 2.1.9. SSO

This is where you can enable Single Sign On (SSO) services. We recommend making sure the SSO services are connected and working properly before disabling login with email option.

In addition, you can enable SAML Single Sign On. Here you can edit your SAML login screen. It is required to give Service Provider Details and Identity Provider Details. If in a Key roll over process additional information is required.

### 2.1.10. Integrations

This is where you are able to enable Integrations with StaffSavvy.
Please see the detailed integration sections at the end of this document for more information.

### 2.1.11. Employee Data: Additional Data

This information can be requested (or required as an on-boarding step). This information allows staff to provide different email addresses or phone numbers for future uses.

- **Additional Personal Email Address (Often useful for payslips and post-employment contact)**
- **Additional Personal Mobile Number (Often useful for post-employment contact)**

### 2.1.12. Employee Data: Dates

These dates can be requested (or required by adding an on-boarding step) from employees. You can stipulate the name of the date and who can edit the data.

This information is shown on employee details pages and is viewable in reports.

**Please note: this is due to be removed in a future version of StaffSavvy. Please use a field set instead.**

### 2.1.13. Employee Data: Employee Numbers

These are additional numbers that can be associated with an employee's account. You can stipulate the name of the number and who can add or edit it.

- **StaffSavvy ID**
  This option allows you to display a staff member's unique StaffSavvy number and customise its format to make it easier and more convenient to reference.
- **Till Numbers/References**
  These can be used for additional employee numbers, till numbers or any other reference number you want to store against an employee. This reference is used for some wage sheet exports. You can use the label fields to call this anything you want.
- **University Number**
  These can be used for additional employee numbers or any other reference number you want to store against an employee. You can use the label fields to call this anything you want. This is used for reference purposes only.

### 2.1.14. Configuration: Organisation

- **Reporting Year Start**
  This is used for several reports in the system including year end for holiday entitlement
- **Default Time Format**
  This is the format for all times shown in the system. Staff can override this on their own accounts too.
- **Default Date Format**
  This is the format for all short-style dates shown in the system. Staff can override this on their own accounts too. An example would be 1/1/2025.
- **Default Time Format (Verbose)**
  This is the format for more verbose dates in the system. Normally this is for titles and will be in the format of 1st January 2025.
- **Default Time Format (Export)**
  Passing dates between computer systems can cause issues with different date formats as the other system will not know if the data is North American style (MM-DD-YYYY) or international style (DD-MM-YYYY).
  For this reason, exports will default to the standardised YYYY-MM-DD format which will not be mistaken.

### 2.1.15. Configuration: Staff

- **Allow staff to request an account**
  When enabled, staff can request access to the site from the login page. Access must be granted before they have any access to the site at all.
- **Request Account: Anti-SPAM Secret Code**
  When an answer is provided here, staff requesting an account must provide the same text as entered. This forms a secret code or secret answer that prevents spam account requests or requests from users who do not have legitimate access rights.
  Accounts provided without an access code will not be created and the information will not be saved.
- **Request Account: Prompt for Code**
  This is the information the staff member will be asked for then requesting an account.
- **Automatically Assign PIN Codes on Authorisation**
  When staff are approved or invited, they will have a clock in screen PIN code generated for them and emailed out.

- **Approve Profile Photos**
  When enabled this requires that all profile photos are approved before they are displayed to other users. It's not normally required but can be used when needed.
- **Employment Eligibility Document Notes**
  This is displayed when a document must be provided in person to be checked. It can be overridden per venue but this should be used to set where (and when) staff can have their documents checked and uploaded.
- **Employment Eligibility Reassessments**
  This allows the system to automatically archive documents used to prove eligibility if the account has been archived for a certain number of months. It effectively means they will need to provide new documentation if they have not worked within this period.
- **Holiday Requests Non-Entitlements**
  This allows staff to enter a holiday request but ask for it not to use their holiday entitlement. They must choose an option from the list you provide here.
  Use the Add Option to add as many items to this list as needed.
- **Holiday Proata Rounding**
  This option controls how prorated holiday amounts will be rounded. The options are; no rounding at all, nearest 0.5, up to 0.5 or down to 0.5.
- **Holiday Rolling Limit**
  This is a general limit that can be used to limit hours of rolling for all staff between holiday years. When entered, it will default the maximum rolling amount to that number of hours (converted to days if their entitlement is in days). Managers can still override this.

### 2.1.16. Configuration: Suspended Staff

- **What to do with their shifts?**
  For suspended staff, you can instruct the system to change/cancel the staff member's shifts.
- **Do you want to fill their shifts?**
  This allows the system to add extra shifts to replace the staff member who is not attending.
- **Do this for X days into the future**
  This allows you to automatically update their shifts for a rolling period of time into the future, up to 90 days.

### 2.1.17. Configuration: Contracts

- **Contract Requirement**
  Allows you to set if staff must have a valid and signed contract (if one is assigned to them) to take shifts.
- **Contract Document Approval**
  When enabled, this option requires a manager to approve the contract document that a staff member has been assigned before they are allowed to view and digitally sign it.
  The approving staff member must be different from the person who assigned the document in the first place and serves to add a validation step for all contract documents before they are signed by the staff member.
- **Contract Limit Date Points**
  Decides the dates the system uses to work out contracted hours limits. This can prevent issues if you

have shifts starting at midnight on the first day of a new contract period and they clock in 5 minutes early. Either this shift will be included in the previous week or the next week.

### 2.1.18. Configuration: Shifts

- **Require Extra Shifts Filled First**
  When enabled, the system will require extra shifts be taken before any shifts with the same time, venue, role and task that are cover requests can be covered.
  This effectively means the shift schedule must be assigned to staff before staff can swap shifts. It only applies to shifts where the details are the same so cover shifts with slightly different times or roles can still be taken on the same day.
- **Regular Shift Creation**
  Regular shifts are set up per day of the week and repeat every week. These shifts allow for any weekly shift patterns to be saved easily.
  Regular shifts can then be converted automatically to either sick pay or holiday pay. This setting states how far in advance the shifts should be created.
- **Send SMS Update**
  If SMS is enabled then this will send SMS messages when changes are made to shifts at short notice. You can use this setting to choose the time frame to send SMS instead of email.
- **Force Shift Off Deadline**
  This setting changes how far in advance of a shift is the forced shift off decision made and SMS sent.
  Read more about the Shift Off feature.
- **Available Shifts Email Rest**
  This controls the frequency of Available Shift emails; defaults to once every 5 days unless staff show an interest in shifts.
  *Notes:* This setting simply changes the maximum frequency that we'll send new shift alerts to staff who have not shown interest in new shifts. If the staff member does view the available shifts then we'll email them as soon as new shifts are next available. If they do not view the shifts, we'll wait up to this number of days before we email them again about any new shifts. Staff can disable these alerts completely.
- **Include hourly holiday costs within shift budget cost**

### 2.1.19. Configuration: Cost Codes

**T**his option displays up to two cost codes on the shift grid page and within time entries. It allows you to set specific costs per whole day, or on certain time entries and then use the pay report groupings to report on the shifts.
This allows cross-charging of hours and well as reports on each type of event etc.

You can enable each code and provide a label for how it's displayed.

## 2.1.20. Configuration: Time Entries / Clock Ins

- **Shift Late Attendance Reason**
  This is the reason that is selected automatically by the system when a staff member is late to a shift. The grace period between the start of the shift and being marked as late can be set per venue.
- **Shift Non-attendance Reason**
  This is the reason that is automatically selected by the system when a staff member does not show up for a shift.
- **Allow Breaks**
  This enables/disables the break options for the entire organisation
- **Force Breaks**
  When enabled, this will force unpaid breaks into shifts even if staff did not clock out for the shifts. This allows you to not have staff clock out for breaks but for the unpaid breaks to be automatically deducted from their shifts. There are several options available when forcing breaks;
    - Apply breaks based on the planned length of the shift. Unplanned time entries do not have breaks deducted.
    - Apply breaks based on the planned length of the shift. Unplanned time entries have breaks deducted based on the time worked.
    - Apply breaks on the time worked only regardless of the planned shift time.

  Note: we strongly recommend that breaks are not automatically deducted. There are legal requirements to take breaks and HSE can impose fines if breaks are not taken (even if deemed optional). Automatically deducting breaks means you cannot accurately track if staff are taking breaks and can be making illegal deductions from their pay.
- **Quick Breaks**
  This feature allows breaks of fixed times (eg 15mins, 20mins) to be added to a shift at the click of a button. You can enter the break options here in minutes. Separate each option with a comma. E.g:
  *10,15,30*
  Will offer quick breaks for 10 minutes, 15 minutes and 30 minutes.
- **Require PIN Codes**
  This option is not recommended. When enabled, it requires staff to enter a PIN code to clock in or out. This means there is extra admin for staff and managers.
- **Merge Back-to-Back Shifts**
  This setting will automatically merge back-to-back shifts for a staff member who is working the same role within the same venue. It allows breaks to be correctly calculated and keeps the timeline and reporting simpler.
- **Time Entry Rounding & Rounding Method**
  This option rounds all time entries to the set period. It’s not recommended as StaffSavvy is happy to handle minutes and seconds of shifts without a problem. As the figures are exported automatically to payroll services, there is no need to round hours for human use.
  You can also choose the rounding method; round to the nearest minute, round up or round down.
- **Long Time Entry Warning**
  This sets what should classify as an excessively long shift. If the shift is longer than this time then it will be flagged when creating wage sheets and in other locations.

## 2.1.21. Configuration: Clock In Screens

- **Display Webcam**
  The clock in screens can display a feed from the device's webcam on the page. This helps to deter staff clocking in other staff members as it appears to be a CCTV feed. When enabled, you might still need to allow the browser to access the webcam; this is normally shown as a warning popup or an icon in the address bar.
- **Record Webcam**
  Note: this requires the webcam to be displayed. You cannot secretly record from the webcam. When enabled, this will take a photo using the webcam at the moment staff clock in and out on the system. These can be reviewed via the Unprocessed Pay page and the Wagesheets.
  Photos are only stored for a limited period; see the Date Retention tab in the Global Settings to see how long the photos will be stored for.
- **Auto Clock Out After Shifts**
  This option will forcibly clock out all staff from their shifts. It's not recommended as the manager review process will catch all staff who have not clocked out and allows better control. By forcing a clock out, you also do not have a record of when the employee might have actually worked even if it is adjusted later.
- **Auto Clock Out Unexpected Shifts**
  This option is the same as the previous one but applies to staff who have clocked in with a PIN code and thus the system does not know when they should be working. The option will simply clock out the member of staff after the set number of hours. This option is not recommended as the manager review process will catch these shifts and ask for expressed approval.
- **Treat PIN Clock Ins**
  This is an option to change what happens when an employee clocks in with just a PIN and no planned shift. By default, the shifts will be marked as unexpected and it will be flagged for approval within the daily shift review to be approved.
  The other option is that the site will expect everyone to clock in and out with a PIN code and accept the shift as a normal shift.
- **Break Access**
  Fixed break patterns are a set of shift lengths and the breaks each length of shift can take.  You can configure the breaks within the break policies under HR Settings.
  Free breaks basically allow every employee to clock out for a break and take as long as they want. All unlimited breaks are unpaid.
- **Remote Deauthorisation**
  This setting allows you to block any deauthorisation attempts on the screens themselves. They must be deauthorised by the Manage Clock In Screeens page.
- **Display profile images on awaiting/clocked in list**
  This allows you to show or hide profile images. The profile images make it easier to select the right account and see who is currently working.

### 2.1.22. Billing

- **Billing Entity**
  This is the name we'll raise the invoices in. Due to several automated systems, please contact our support team to change this.
- **Billing Address**
  This is the address we will include on your invoices.
- **Invoices Sent To**
  This is where we'll send copies of your invoices to. You can add multiple email addresses or access the invoices under the System > Finance menu option.

### 2.1.23. Data Policies: Data Privacy Declarations

- **Staff Declaration**
  The information is displayed to users when they first provide data when creating or completing their StaffSavvy account. If this is blank, we will provide generic information for your users.
- **Recruitment Applicants Declaration**
  The information is displayed to users when they first provide data for their recruitment application. If this is blank, we will provide generic information for your users.

### 2.1.24. Data Policies: Auto Archive Staff

- **Automatically Archive Inactive Staff**
  This option will automatically mark staff to be archived when they have been inactive in the system for a set period of time. This will simply disable their access from the site and remove them from staff lists etc.

- **Archive After**
  How many months a staff member must be inactive before being automatically archived.
- **Apply to Levels**
  You can choose which levels the automatic archive option applies to. This is to prevent senior managers who might not use StaffSavvy often from being removed repeatedly.
- **Notify Us**
  This is where you can enter the email addresses you would like to be notified when an account is archived (or when one of the following two email notifications are also sent). Separate each email address with a comma.
- **Notify When Leaving Date is Set**
  When this option is enabled, we'll send an email notification to the email addresses in Notify Us whenever an account's leaving date is set, changed or removed.
- **Leaving Date Warning**
  When this option is enabled, we'll send an email notification to the email addresses in Notify Us one month before the account is due to be archived.

### 2.1.25. Data Policies: Data Retention

- This is the length of time data is stored by the system.

### 2.1.26. Data Policies: Data Backup Retention

- This is the length of time Backups of your StaffSavvy data are stored for. To change this contact StaffSavvy support.

## 2.2. Venues

A venue in StaffSavvy can be used for lots of different things; they are often physical departments or locations. A venue has its own shift schedules and budgets. Staff have a home venue but can be given access to any other venues as well.

Each venue has its own management structure and a lot of different configuration options. You can create as many venues as you want and configure them to match your needs.

See the Venues section under Staff Management for more details.

## 2.3. Venue Groups

Venue Groups allow venues to be grouped into different combinations for use in reports, shift management and time sheets.

Venues can be shown in as many venue groups as needed so you can split your different venues in different ways to compare both physical locations and different venue types.

You are also able to set the orders of the venues within the group and this allows you to manage how they will be displayed on various reports.

### 2.3.1. Automatically assigned to all venues in a venue group

This allows you to ensure that all staff within any of the venues of a venue group have access to all of the other venues. It’s perfect for departments as it prevents any managers needing to manually assign lots of venues to lots of new staff.

Note that you will only be able to enable this option if you have permission to view all venues within that venue group.

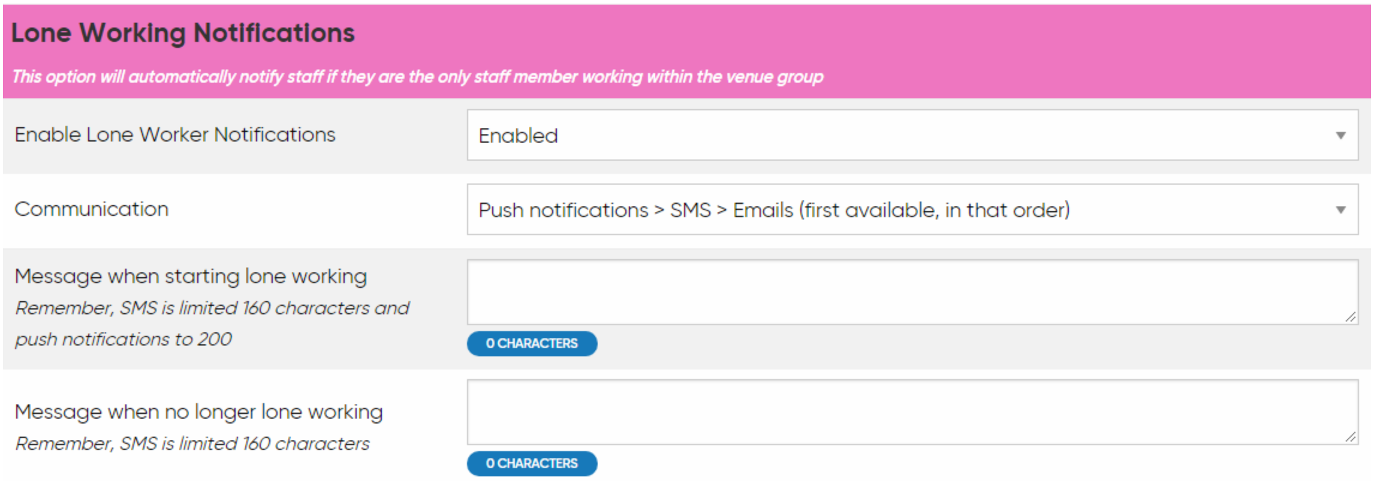
### 2.3.2. Lone Working Notifications

Lone Worker notifications are designed to help keep single workers safe across a large venue, campus or complex. When enabled, the system will notify staff when they are the only clocked-in members on site or when they cease to be the only clocked-in staff member.

These notifications can be via Push notifications (in the apps or using desktop notifications), using SMS credits or email notifications. You can also choose the priority of the notifications so the system will try one before trying the next notification method.

Configure this feature on a venue group so that it covers all venues within the group. If you want the feature on a single venue, you'll need to create a venue group with just that venue in it.



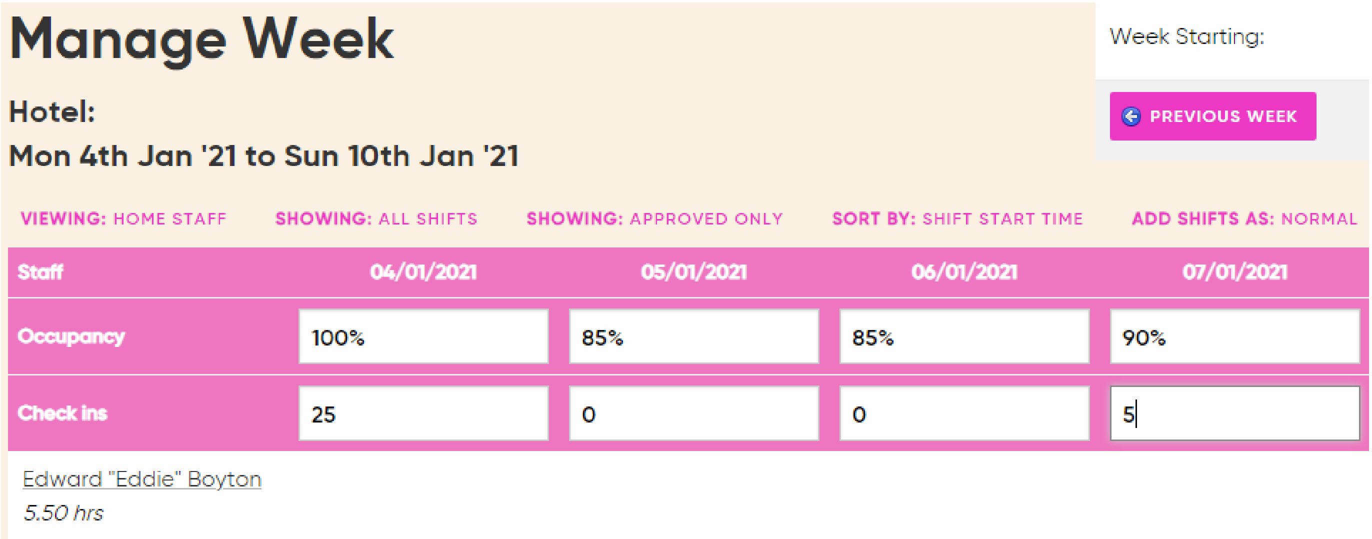

Then, enter the message you wish to show to staff when they start working alone and the message when they finish. Keep in mind that SMS messages are 160 characters so longer messages will take multiple credits.

### 2.3.3. Information Fields

These optional data fields are displayed on the manage shift week page and allow data to be shared across a venue group.  They might offer information such as occupancy levels, expected attendees or other details useful for multiple teams.

To use these fields, enable the number of fields you need (up to 5) and provide a label. Once enabled then the venues who have this venue group set as their default group will have the options displayed within the week view:

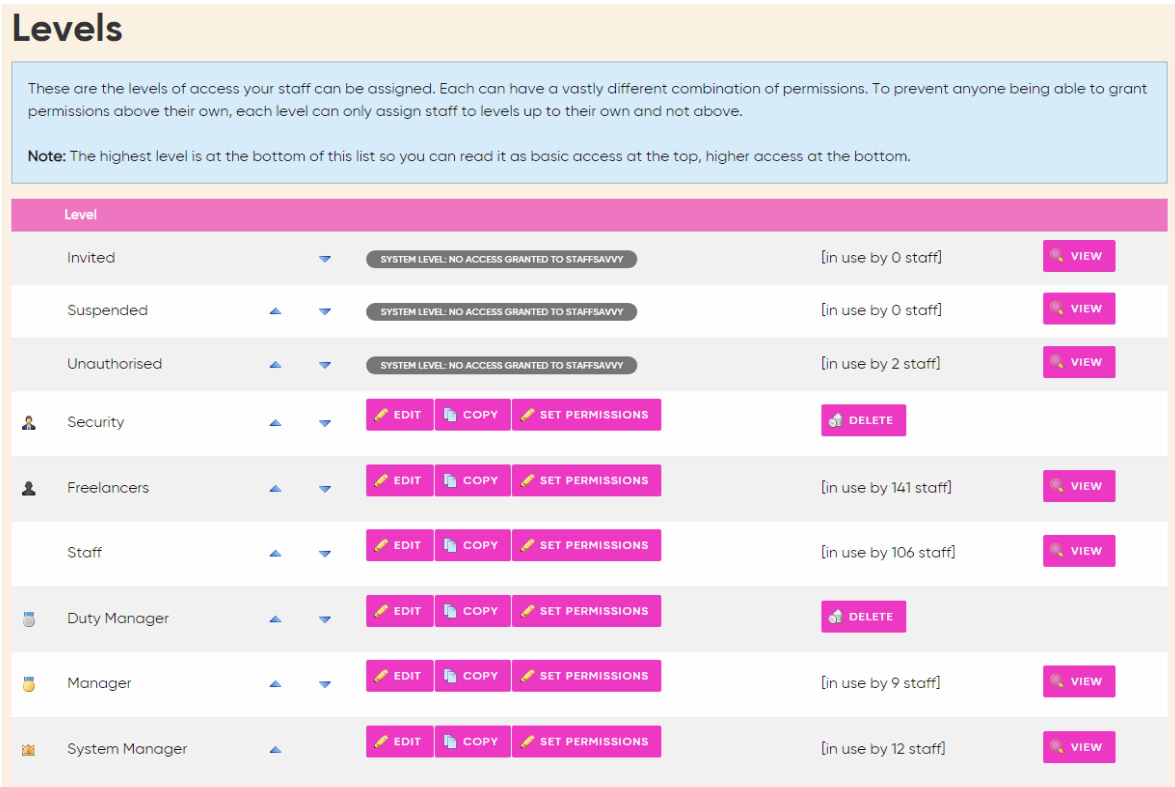
 




# 3. Staff Accounts

## 3.1. Access Levels

Access levels are set up and managed under Staff > Staff Settings > Access Levels.



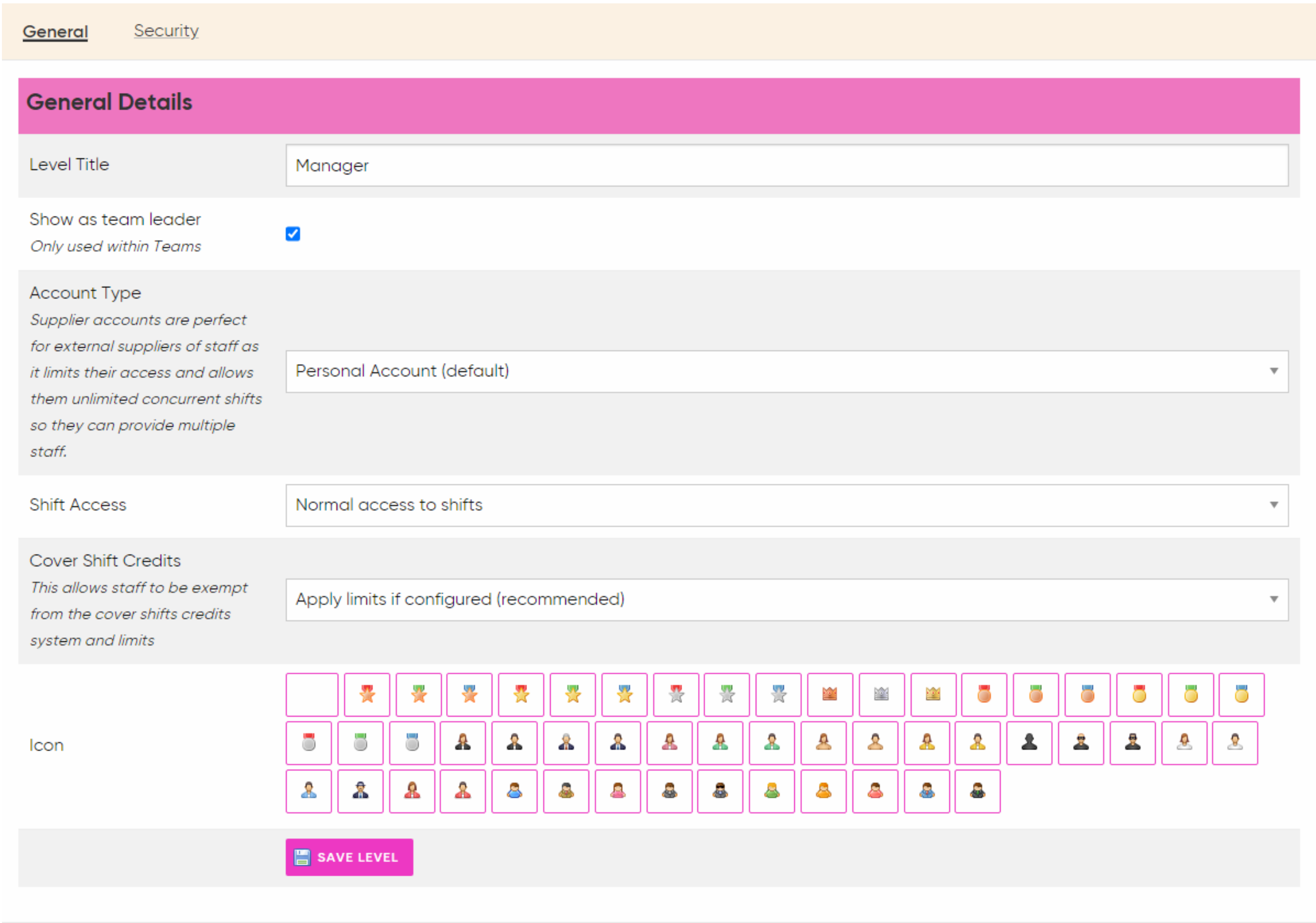
We provide default access levels but we recommend these are customised for your organisation so they fit with your terminology and hierarchy. Access levels are critical for managing permissions in the system but they also allow some additional features.

Each access level can have its own unique set of permissions assigned to it which might not share any similarities with other access levels (e.g. HR and Payroll teams might have completely different permissions). In general however, the levels have more access to the system as you go down the list.

You can copy, create afresh or remove any of the levels which are not in use by active accounts on the system. The View button allows you to see who is assigned to an access level.

### 3.1.1. Access Level Options

When editing or creating a level, you have several options which dictate how it will be used.




In the general tab:

- **Show as Team Leader**
  In the basic teams feature, you can display some staff as team leaders. This is determined by their access level. Check this box to make staff with this access level team leaders for the team they are in.
- **Account Type**
  - **Personal Account**
    Default option. Staff sign in to this account and it's a personal account for them.
  - **Supplier Account**
    Removes restrictions such as working two shifts at once or any personal details. Designed for suppliers of staff or resources so they can log in and see staff requirements.
  - **Suspended Account**
    No access to system and suspended rules apply
- **Shift Access**
  Allows accounts to be assigned shifts by the system. Also, can be used to block staff from being assigned shifts. **Cover Shift Credits**
  Cover shift credits is a system to help manage cover requests and encourage staff to cover each other and pick up additional shifts. This option allows you to exempt some levels from these rules (if they are in use).
- **Icon**
  Staff will have this icon next to their name and image when adding messages or posts.

Under the security tab:

- **Password Rotation**
  This allows you to enforce a policy of password rotation for accounts on this access level.
- **Password Reuse**
  This allows you to prevent the same password being reused on an account for a certain number of days.
- **Multi-Factor Authentication**
  This allows you to require use of multi-factor authentication on access of this level. It allows you to enforce this recommended security feature for accounts. We recommend it for all accounts with access to personal data.
  Staff will be required to install a MFA app on their personal devices so that a security code can be generated that allows them to log in. Any TOTP Multi-factor app is supported.

## 3.2. Staff Data Sets & Fields

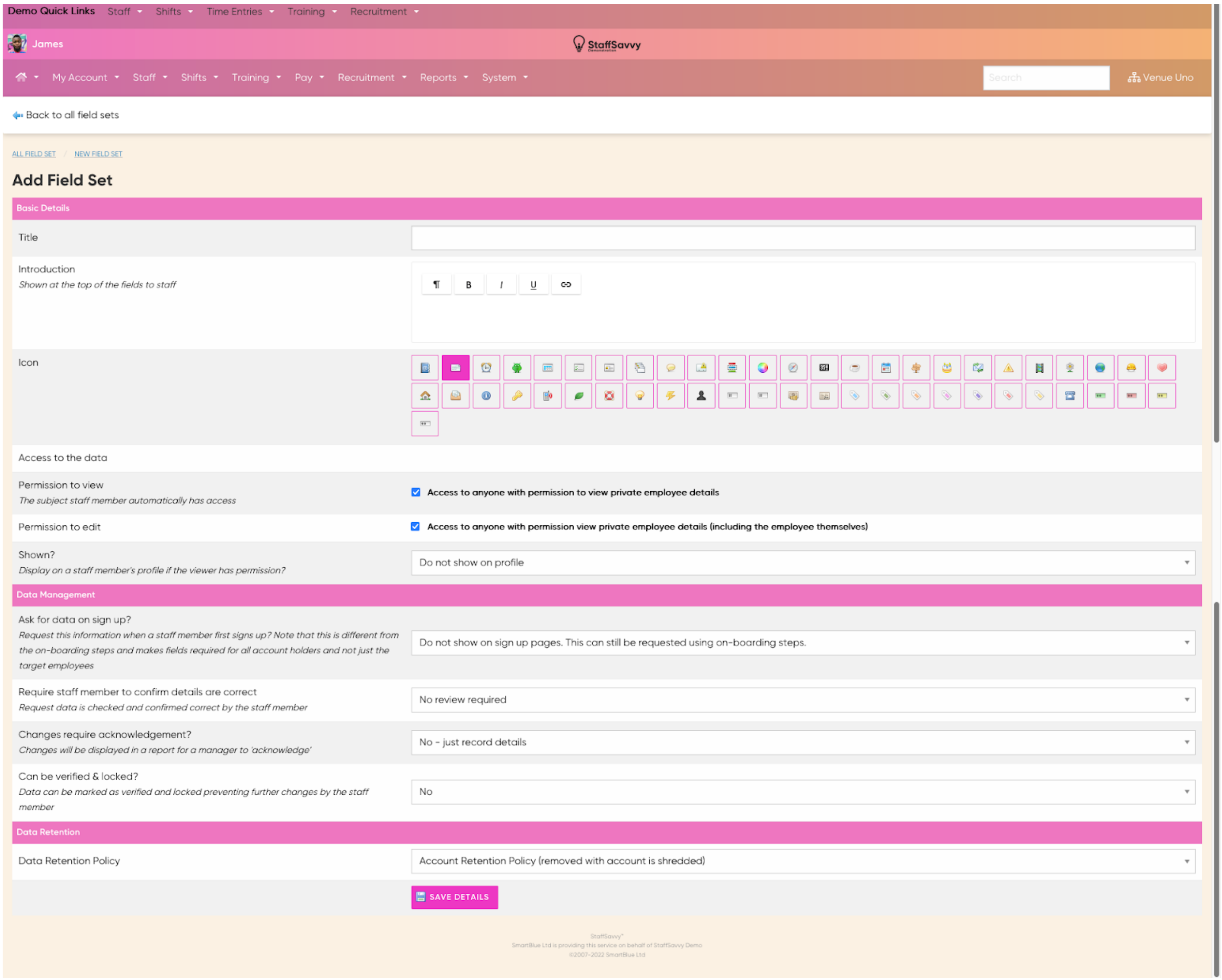
Data Sets allow StaffSavvy to record unlimited amounts of data against each profile. We include standard data sets such as Bank Details, Emergency Contact Details and Home Address that you can simply turn on.

You can also add any custom data sets you need. For example, you might want to create an organisation-specific section on Ethnicity and Diversity.

Go to System > HR Settings > Data Sets & Fields. This will list the Field Sets within the organisation plus a few system options that you can enable if required.

To add a new Field Set, go to Actions > Create New  Field Set.

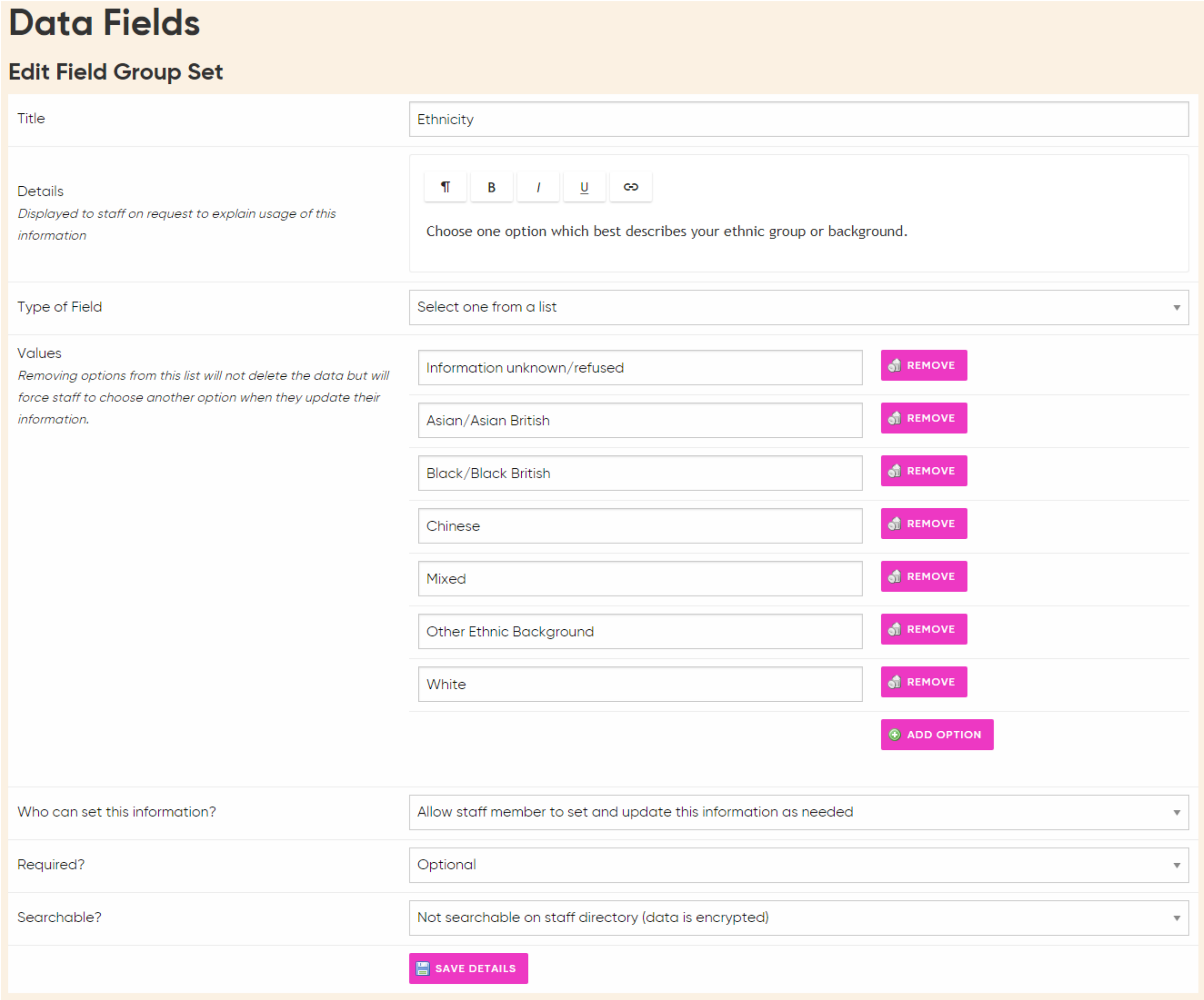



The picture above shows the add field set options. Here you can manage who has access to the information and who can edit the details.

In addition, you can configure where the information should be shown on the staff member's profile page (if they have permission to view the details). You can also set the site to request the information on sign up for an account.

Once the field set is created then you can add fields to that set. The sets are purely there to help organise the information and permissions.

You can add fields by clicking the Edit Set Details button and then adding a new field under the Actions menu. When you add a field, you will see the following information form.




The title and detailed information will be shown to staff and managers alike. It is there to provide information to them on how the data should be used.

The Type of Field option obviously allows you to choose the type of data that this field will hold. Some of the options such as multiple select will require you to provide the options that can be selected.

The rest of the options on the form allows you to control how the information can be updated, if it must be provided and if the information can be searched for on the staff director page (if you have permission to view).

### 3.2.1. Data Management

Data management can be managed by going to ‘Edit Set Details’.

This allows you to automatically manage your data lifecycle for each of the data sets. You can ask for the data when accounts are initially set up or confirmed.

You can set a review period so that StaffSavvy will automatically display the data to the staff member and ask them to update or confirm the data as correct.
In addition, you have options to request the data be acknowledged by managers (so other tasks can be updated normally) and also allow the data to be verified and locked.

Locked data means the staff member can't change it without a manager unlocking it first.

### 3.2.2. Data Retention

This allows you to configure an additional data retention policy. By default the data will be shredded with the rest of their account details but you can configure the system to shred this information sooner. This ensures that you don't store it longer than is necessary and new data will be sought if they return.

### 3.2.3. Data Set Report

When editing the field set, you will have access to the Data Set Report in the Actions menu.

This report will show you all of the fields within the field set and number of staff who have provided each answer. It will also display the percentage of staff providing that answer.

### 3.2.4. Summary Report

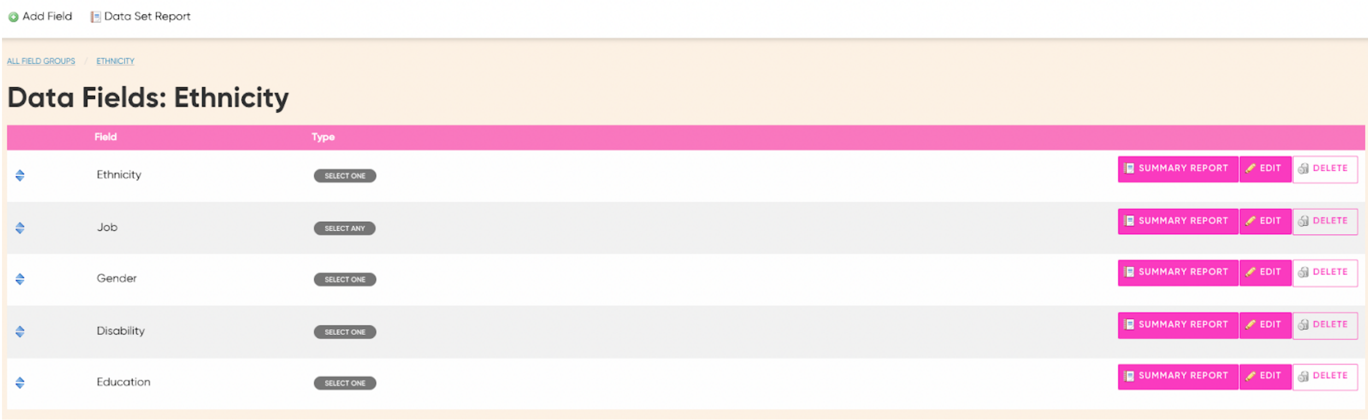
For each field, you can see a report of the answers provided by all active accounts. This will be presented in a list of all field answers, a total number of staff who chose that answer and a percentage.

This can be viewed from within a field set by clicking the summary report button on the right of the field of interest.

## 3.3. Data Field Organisation

Data Fields can now be easily reordered within the data set. To do this, first go to System > HR > Data sets and Fields > Edit Set. Once you are in the Data Field Set page you can rearrange the Fields by hovering your cursor on the blue arrow button next to the Field you want to shuffle and dragging it below or above.

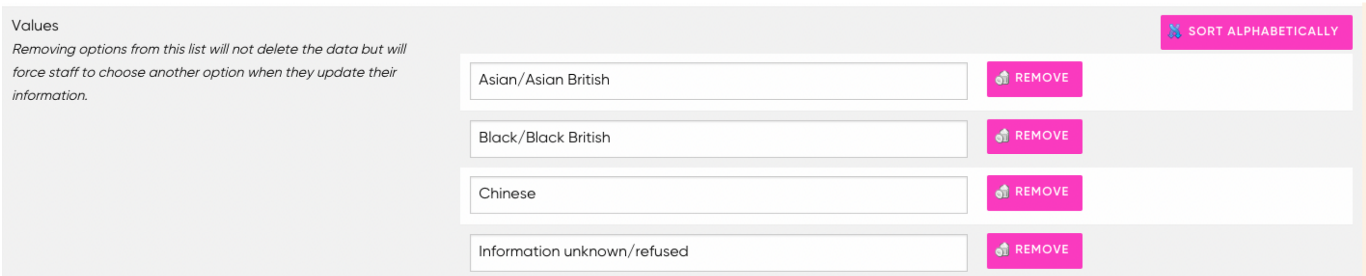
 




## 3.4. Alphabetical Data Field Options

Reports that include data fields, i.e. Ethnicity can now be sorted alphabetically. This means that you can more easily find and organise your data. Only certain data sets have data fields and allow this feature.

To find this, go to System > HR > Data Sets and Fields > Edit Fields. Here you can create a new field or edit and you'll see the new option to sort the items alphabetically.




## 3.5. Creating Accounts

If you are using our Recruitment Add-On then you do not need to create staff accounts. Applicants who digitally accept their job offers will automatically have accounts created and their details copied across.

There are three ways to create staff accounts. We recommend you use the Request an Account option which basically asks the staff to sign up themselves and then are approved by managers.

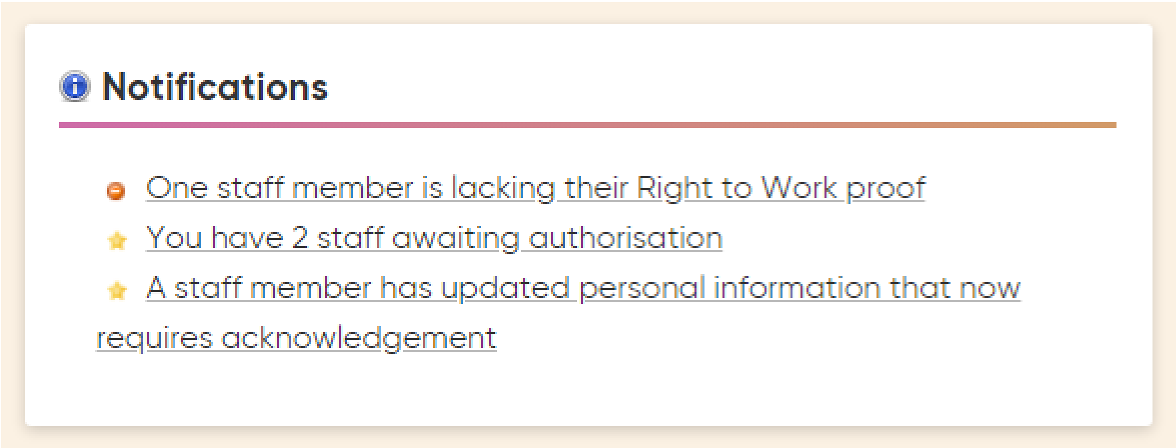
### 3.5.1. Request an Account

The easiest and most recommended method is by simply asking staff to create their own accounts. On the login screen for StaffSavvy is a button marked Request an Account. This allows staff to complete all of their information and send it to you to approve. Staff can't access your site without being approved so this is a very safe and easy method. It means you do not need to collect staff contact details manually.

### 3.5.1.1. Authorise Accounts

For accounts created using the Request an Account, they need to be authorised before gaining access. All other methods will provide instant access.

Once you have accounts to approve, these will be displayed on your dashboard under a panel called notifications.




Simply clicking on this, will display a list of all of the staff awaiting approval; each staff name is listed down the left of the screen. This can also be accessed via Dashboard > Staff > New Staff > Authorise Accounts.

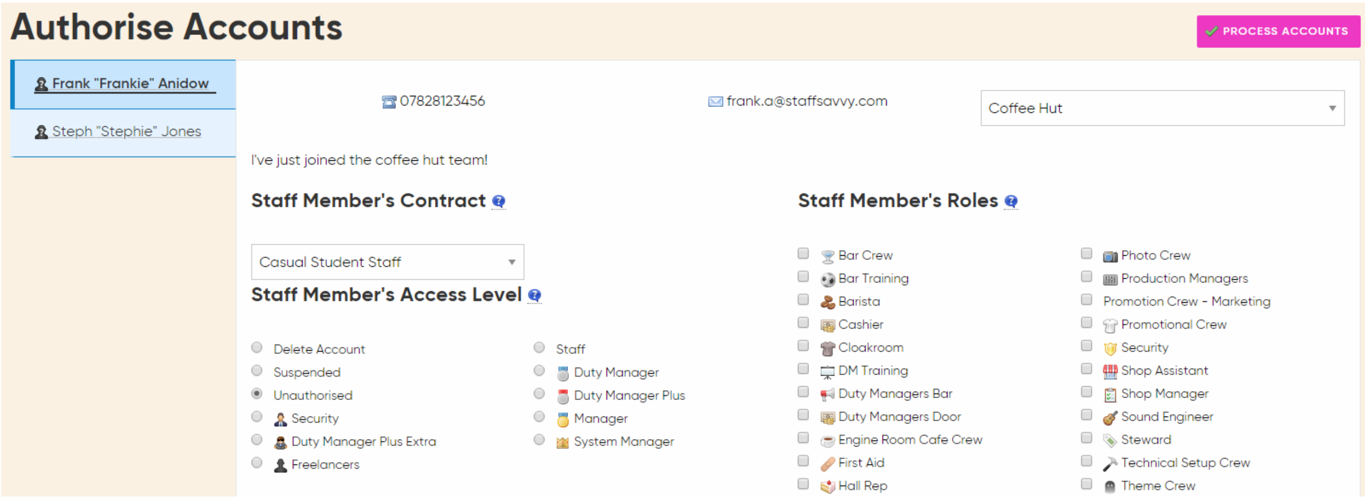
Their key contact information will be displayed on the right. Underneath this, the levels the staff member can be assigned is listed. To approve a staff member, simply select a level other than ‘Unauthorised’ and click the Process Accounts button at the bottom of the screen.

You will normally want to assign the staff member a couple of roles as needed so they can start working and be assigned shifts as needed.

If you don’t recognise the account, then you can use the Delete option in the list of levels to delete the account and block the email address.

Once you approve the staff member, they will be sent an email to let them know they can access the account.




### 3.5.2. Invite Staff

To navigate to this page go to your Dashboard > Staff > New Staff > Invite Staff.
This page allows you to get accounts setup on the system with minimal information.  There are two options; instant access or create account (but with no immediate access).

The instant access option allows you to pre-set the staff member's access level within the site. Simply enter their email address, select their home venue and choose their access level. They will be sent a welcome email which allows them to sign up for the system and provide all of their information.

If you provide their name when setting up, then you will be able to edit their account immediately. If you leave their name blank then you will need to wait until they have accepted their invite and provided this information to you. They will not appear on the site until their name has been provided.

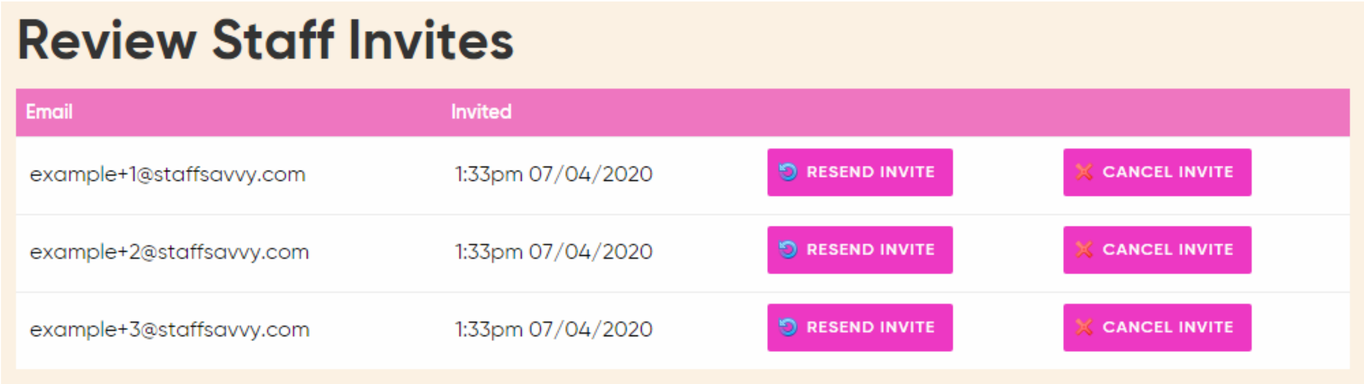
Alternatively, the no immediate access option requires you to provide their email, first name and last name. The staff member will have an account created but they will not be given access and they won't receive a welcome email (yet). This allows you to set up more details on their account without them having access.

Once you are ready to provide access, go to the Staff > Staff Settings > Manage Staff page and search for the staff member. Under the Manage menu on their row, you will have an option to send their invite email.

You can view your active invites from the invite staff page anytime. From here you can also cancel their invite or re-send the invite to them.

Resending the invite will also create a new activation link so the staff member needs to use the newest email they have been sent.




### 3.5.3. Create Account

This option allows you to set up a complete account on behalf of a staff member. You will need to provide all of their information including email and mobile details.

There is an option to email them a temporary password; they will be asked to change it when they log in.

This has the benefit that the account is ready to use immediately and can have shifts assigned to it straight away. However, this requires a lot more admin than the other methods and thus should only be used when really needed.

## 3.6. Logging in

You must be logged in to view any part of the system. This is using a simple email address and password.

This must be entered in order to access your account and the wider system.

### 3.6.1. Forgotten Passwords

If you or another staff member has forgotten their password, then you can request it is reset using the Forgotten Your Password link on the login page just under the Password field.

This will take you to a page where you can enter your email address and have a new password sent to you.

#### 3.6.1.1. Unknown Accounts / Archived Accounts / Suspended Accounts

To improve security, we only display a generic message when you are unable to log in to your account. This is so attackers are not able to use failed logins to work out valid email addresses held by the system.

To assist users struggling to login, we will send emails to the address provided if:

- **Unknown Account**
  The email address used to login is not attached to another account. If they are sure they have an account

then please double check the email address. It must exactly match the email address provided when the account was created.
Some email accounts have multiple domains that will work for sending emails. For example, @gmail.com and @googlemail.com will both work when sending emails to an address there; however the email address must be an exact match to your account in StaffSavvy.

- **Archived Account**
  If the account is no longer active then we'll inform the user via email so that they can discuss this with the line manager. We are unable to restore accounts without approval from another system user who has permission to do so within StaffSavvy.
- **Suspended Account**
  If the account is currently suspended then we'll inform the user via email so that they can discuss this with the line manager. We are unable to restore accounts without approval from another system user who has permission to do so within StaffSavvy.

### 3.6.2. Failed Logins

To prevent brute force attacks on your account, the system will automatically suspend all access to your account if multiple failed login attempts are made.

This suspension will last a few minutes before being lifted. Multiple suspensions can lead to email verification, longer suspensions and permanent access suspensions.

We do not disclose the exact processes or timings to help protect your account.

### 3.6.3. Multi-Factor Authentication (MFA/2FA)

This is the process where we need to verify a second piece of information before providing access to your account. It is the best way to prevent any unauthorised access to your account as an attacker needs both your password and the second piece of information.

This second factor is normally a time sensitive code that you can only access on a device you have sole control of.For example, your mobile phone. This means you must have both your mobile phone and your account password to login. As most attacks are conducted remotely, it severely limits the possibility of someone else using your account.

Multi-Factor Authentication can be enabled on any account and you can also enforce its use on certain access levels. This will mean staff who have access to personal details must enable and use multi-factor authentication.

We currently support Time-based One-time Password Algorithm (TOTP), which requires an app to be installed on your mobile device. We recommend either Google Authenticator or Authy; both are free and can be installed from your app store.

Setup your additional security options under Dashboard > My Account > About Me > Account Security.

Under the Multi-Factor Authentication box, click the Add Multi-Factor Protection button. Enter your account password to verify it's you.

You'll then see a QR code. This is the code you need to scan with your TOTP app such as Google Authenticator or Authy. Once scanned, you will need to confirm it's all working by entering the current code from your app back into the popup on StaffSavvy.

Once accepted, MFA will be enabled on your account and you'll need your device to log in.

# 3.7. Profile

Every account has a detailed profile page. This profile page provides summary information about the staff member but also provides access to edit and update their account, view detailed reports and archive their account.

You can access the profile page by clicking on any staff member's name when it's in blue or their profile picture.

The information and options shown on a profile page will depend heavily on the access and permissions you have for that staff member. You might be able to see all the details, access all reports and make all changes. You might also only be able to see basic information such as name, venue and profile picture.

## 3.7.1. Actions Menu

The actions menu gives managers access to edit any part of the staff member's profile from roles to venues, holiday bookings, absences, shift reports and more. Additionally, there is the option to 'Become' a staff member which allows you to view the Staff Savvy system from that employee's account to see how the website will appear to them.

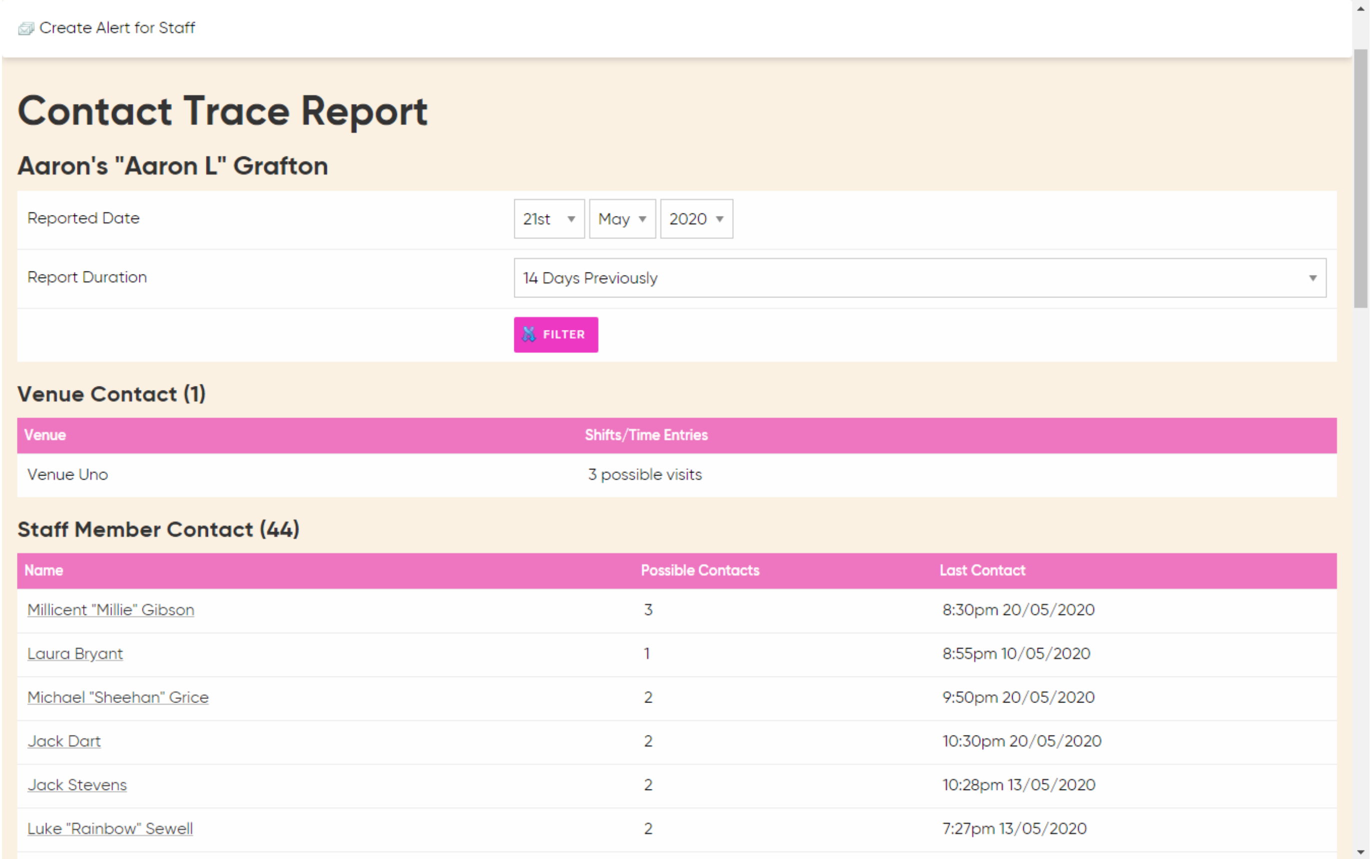
From this menu you can also:
- Edit a staff members role/details/venues
- Create reports
- Manage training progress
- Send a personal message to staff member
- View a staff member's documents

### 3.7.1.1. Reports: Contact Tracing Report

This report allows for tracing of the locations and staff that a staff member has probably been in contact with using their shifts and time entries.
- View the locations a staff member has been reported at over a period of time
- View the other staff members at each of those locations during the same period
- Create an alert to those staff members at a click of a button

There is also the option to send out an alert to all staff members in the report so you can advise them of any issues.


Create Alert for Staff

Contact Trace Report

Aaron's "Aaron L" Grafton

| | |
|---|---|
| Reported Date | 21st May 2020 |
| Report Duration | 14 Days Previously |
| | FILTER |

Venue Contact (1)

| Venue | Shifts/Time Entries |
|---|---|
| Venue Uno | 3 possible visits |

Staff Member Contact (44)

| Name | Possible Contacts | Last Contact |
|---|---|---|
| Millicent "Millie" Gibson | 3 | 8:30pm 20/05/2020 |
| Laura Bryant | 1 | 8:55pm 10/05/2020 |
| Michael "Sheehan" Grice | 2 | 9:50pm 20/05/2020 |
| Jack Dart | 2 | 10:30pm 20/05/2020 |
| Jack Stevens | 2 | 10:28pm 13/05/2020 |
| Luke "Rainbow" Sewell | 2 | 7:27pm 13/05/2020 |

### 3.7.1.2. Reports : Holiday/Time Off Report

This report shows all of the entries recorded against a staff member's holiday allowance. It allows for the days to be edited or removed as well as add missing entries.

### 3.7.1.3. Reports: Shift and Time Entries Report

This report shows a staff member all the shifts they have had between a chosen start and end date.

### 3.7.1.4. Reports: Check In Report

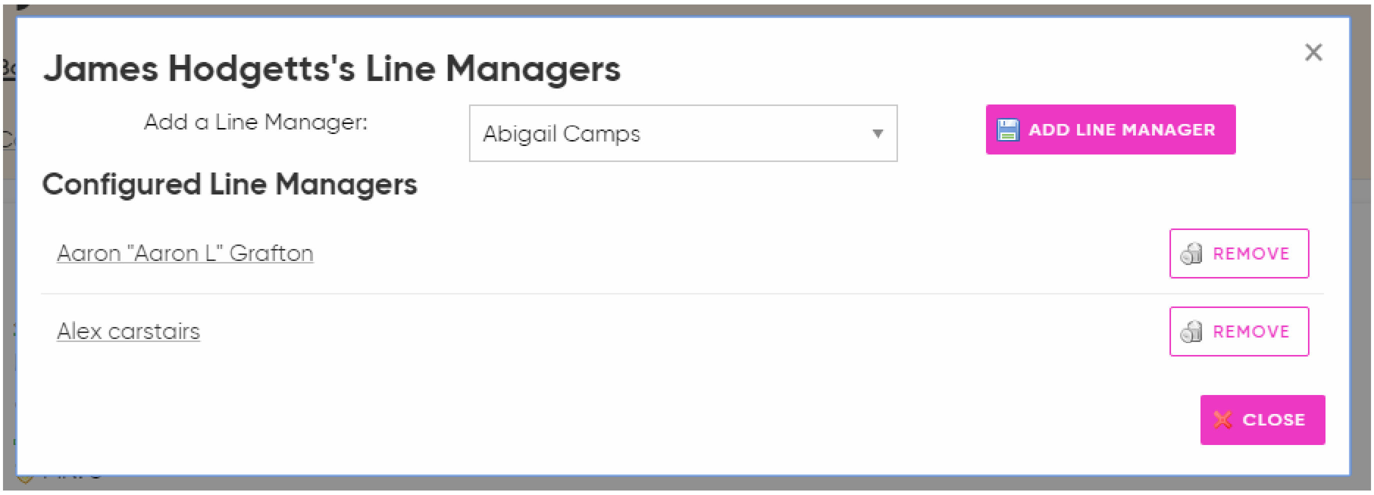
This report shows all of a  staff member's completed check in forms. These are more regular reports that can be used to keep track of staff health, well-being or ensuring a staff member has the right equipment for the day. You can filter to only view forms that have raised alarms.

### 3.7.2. Custom Line Managers

Under the Actions menu, you are able to set custom line managers for this staff member. Without these set, they will default to having their home venue's managers as their line managers.

It’s important to configure the venue manager’s line managers otherwise they will be assigned to manage themselves.




### 3.7.3. Basic Info

This tab includes generic information about the profile; where they are based, current access level, their line managers and anyone they line manage.

It will include employee numbers, PIN codes and last logged in dates depending on access and which features are enabled.

The staff member’s contact information will also be displayed and can include up to two email addresses and two phone numbers. Staff members can also provide details here for an Emergency Contact.

We also include a profile image and personal statement in the About Me section.

#### 3.7.3.1. Support Code

The support code is a private code visible only to the staff member and the StaffSavvy support team. It allows the support team to verify the staff member who has contacted them is the person they claim to be.

Do not share your support code with anyone other than the StaffSavvy support team.

### 3.7.4. Employment Details

This section includes details on the staff member’s employment with you. Start date, leaving dates along with assigned contracts.

You also have access to Employment Eligibility statuses, onboarding status and any payroll specific information.

### 3.7.5. Additional Details

This tab provides access to an array of data field sets. You can choose which data sets appear here. This is commonly used for addresses, demographic details and additional details you might wish to record.

Access to edit this information (if permitted) is under the Actions menu.

### 3.7.6. Training and Roles

This tab includes the staff member’s roles, exam results and training progress.

The roles will be displayed in a table and it will confirm if they are active and allowed to work that role, or if there are requirements outstanding. The details button will provide a breakdown of the requirements needed.

Training programs that the staff member can access are listed along with their current status and access to any digital certificates.

The exams list provides access to all completed exams and the details button includes a breakdown of their answers and scores.

### 3.7.7. Shifts

This tab includes quick access to the staff member’s next 10 shifts, along with lifetime statistics about their shift management.

### 3.7.8. Absences

This will only be displayed if the staff member’s primary contract includes an absence policy.

From this tab a staff member can have absence recorded or removed, managers can see the different absence types and review reports for those.

There is also an automatic Bradford Factor calculation.

### 3.7.9. Personnel Record

Personnel Record entries allow for managers to create and store documents or letters from templates provided by system administrators.

The record can be of any content at all and can be fully customised by the manager when completing the entry.

Records will stay within the active panel for their set duration and then move to the historical panel for your records.
This is also where Welfare and Performance records will be displayed.

### 3.7.10. Contract

This provides details of the staff member's primary contract; from expected hours to maximum hours. It also includes three summary boxes for the current period, last period and the upcoming period. If the contract is set to cover a week, these boxes will show this week, last week and next week.

They also provide quick access to detailed reports.

### 3.7.11. Availability

This tab is only shown if the staff member does not have a holiday allowance.

It will display any booked time off periods that have been approved alongside a summary of their weekly preferences as they provided.

### 3.7.12. Holiday

This tab is only shown if the staff member has a holiday allowance.

This will show a summary of the staff member's holiday bookings and a breakdown of their holiday entitlement and how it's been currently used.

You can still access the staff member's weekly preferences from the Reports > Availability Preferences  section under the Actions menu.

### 3.7.13. Awards

This tab displays awards a staff member has recieved. From this tab you are also able to nominate a staff member for an award. You can edit the award title and the reason for the nomination.

# 3.8. My Account

Each account is separated into various areas across several menu drop downs. The menu can be different per site so you might have additional options from these below or fewer.

- **About Me**
    - **My Profile**
      Takes you to your personal page where you can see details about your account, your work history and training.
    - **Update My Details**
      Keep your personal details up to date in this area. Add your name, nickname, contact details and more. See 3.6.1 for more detail.
    - **Change My Photo**
      Add a photo of yourself so that others can easily recognise you on team pages and across the site.
    - **My Documents**
      This is the storage page for all documents uploaded to an employee's account. You can allow them to upload some documents and others (for Employment Eligibility proof) are uploaded via approved managers. See 3.6.2 for more detail.
    - **My Work Eligibility (if enabled)**
      This page gives employees information on how they can prove their Employment Eligibility. Once completed, it will provide a list of their documents and their status - particularly any that are expiring. It will also tell you your classification here, which determines which documents you need to legally work.
    - **My Account Security**
      From this page you can view your saved devices, recent activity on your account and enable/control Multi-Factor Authentication.
      MFA is a process where we require a code from a personal device (such as your phone) when you are logging in to ensure it's you and not someone guessing your password.
    - **My Notifications**
      This page provides access to set up email notifications and push notifications to devices. Push notifications are the messages that appear at the top of your phone screen to tell you about events or new information. Push notifications will only be sent to trusted devices.

- **My Availability**
    - **Weekly Preferences**
      This allows you to set your availability from week to week. It doesn't affect any shifts you have already been assigned but will be taken into account when assigning new shifts or making changes. Blocks of dark green are locked and can not be marked as prefer not to work.
    - **Add a Time Off Request / Request Holiday**
      This allows you to request holiday or longer periods when you are not available to work depending on your contract rules.

- **My Time Off Requests / My Holiday Requests**
  View your requests, ask for changes or request cancellation of any request.
- **Request Planned Absence**
  This allows you to view and make requests for other types of leave such as Maternity, Paternity, Jury Service etc. The exact options available here will be based on your organisation.

- **My Tasks**
  Review all completed and upcoming tasks you have. This is also where you can view tasks that you have created. For more detail see 3.6.5.
- **My Messages**
  Review any messages that have been sent to you, and also send messages. Click “Send a new Message” in the Actions menu to create a new message. Choose the people that you would like to send the message to, the title, and the message itself. In the actions tab you can also set an ‘Out of Office’ message. For more detail see 3.6.4.
- **My News**
  Review the latest news from your staff. New posts will be highlighted.
- **My Team**
  List of the current staff members in your team.**My Alerts**
  List of alerts and information. You are able to keep track of the alert, when it was posted, who posted it, and when you signed it.
- **My Goals (if enabled)**
  This lists your goals or objectives and allows you to post updates to each of them. This tab will also tell you the deadline for set goals and allows you to view the certificate for completed goals.
- **My Tasks**
  This lists the tasks assigned to you or that involve you.
- **My Events**
  See the list of events that are open for you to attend and any events that you are already planning on attending.
- **My Time Entries & Pay**
  Keep track of the hours and shifts you have worked.
- **My Expenses  (if enabled)**
  Make expense or mileage claims and view their current status.

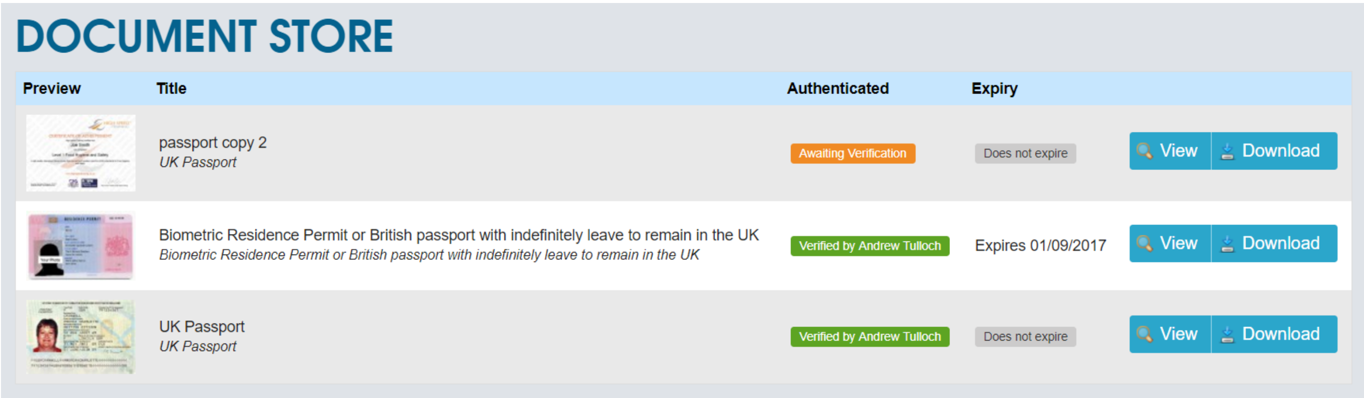
 

### 3.8.1. Update My Details

This is where you can view and update the information stored about you on the system. Everything from your name, contact details, preferences on time formats and other information your organisation has decided to collect.

This is also where you can change your password and set a new password. You'll need to enter your previous password at the same time.

### 3.8.2. My Documents


DOCUMENT STORE

| Preview | Title | Authenticated | Expiry | |
|---|---|---|---|---|
| | passport copy 2<br>*UK Passport* | Awaiting Verification | Does not expire | View Download |
| | Biometric Residence Permit or British passport with indefinitely leave to remain in the UK<br>*Biometric Residence Permit or British passport with indefinitely leave to remain in the UK* | Verified by Andrew Tulloch | Expires 01/09/2017 | View Download |
| | UK Passport<br>*UK Passport* | Verified by Andrew Tulloch | Does not expire | View Download |

This is where all of your documents will be stored. This can be used for lots of different documents and it is designed to allow you to see all documents that your employer has stored for you. Documents will fall into the following categories; All, Certificates, Contracts, Documents and Welfare and Performance.

Some documents you can upload yourself and remove. Others are being stored for legal purposes (your passport for example).

If you want to add a document to the store then you can do this under the Actions menu at the top.

You might also be directed by the system to complete or upload certain documents based on your employer's policies.

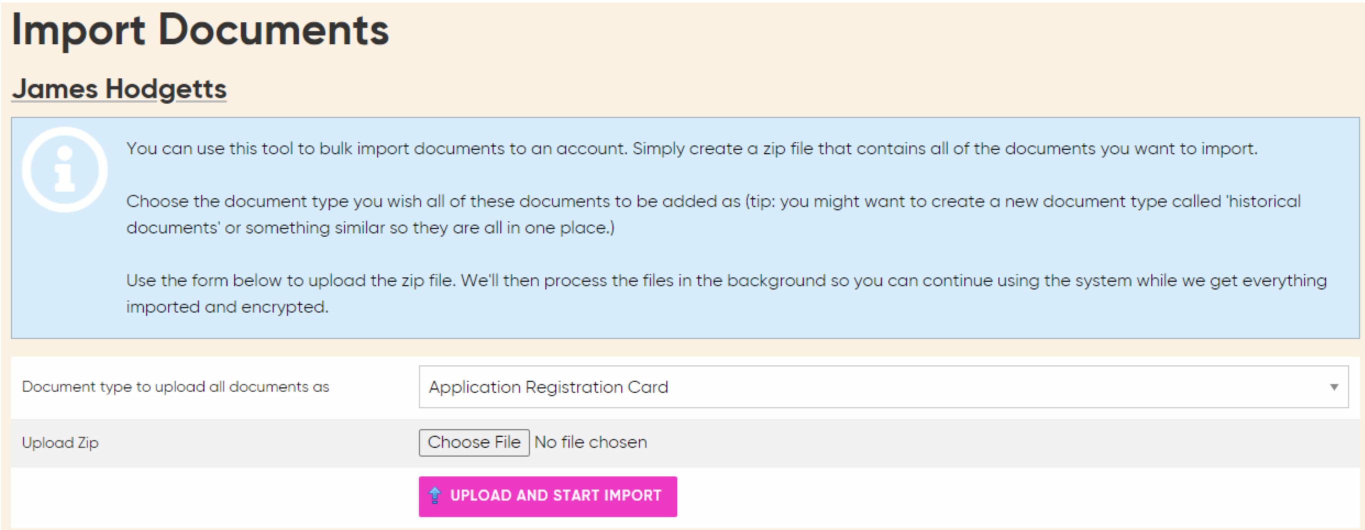
All documents are displayed here to make it easy for you to access them all in one place. Across the top of the page is a View filter which allows you to view certain types of documents rather than all of them on one list.

#### 3.8.2.1. Bulk Import of Documents

This option allows you to upload a zip archive of multiple documents to a staff member's account.

Each document will be checked and added into their document store. The files will all be imported as a single document type into their profile. It's a perfect tool to import historical documents.

On a profile page under the actions menu, chose Documents > All ( Insert Staff Member's name) Documents. At the top of their documents use the Import Documents option. This import page will keep you updated with the import progress.




### 3.8.3. My Shifts

This page will display your shifts. The tabs across the top of the page allow you to see your Upcoming and Previous shifts, as well as your shift calendar. You can see your shift times, your role for that shift, your venue (if you happen to work at multiple venues), and if there is a particular task that you need to complete during your shift. This page is available for all staff members who should be able to exchange, send and request shift cover themselves, depending on their contract.

The Options button in the last column allows you to:

- Request cover for your shift (see Requesting Cover)
- Send your shift to someone else with the same skills (Sending Shifts)
- Exchange shifts with someone else (Exchange Shifts)
- Split your shift (Splitting Your Shift)

The "Details" column reflects the status of your shift if you have chosen one of the options and if you have picked up a covershift (see Available Covershifts in Shifts).

The Shift Details button will take you to a dedicated page that shows all of your information about that shift. The page includes a history of changes to the shift including changes to times, staff and status. The page also shows a full breakdown of the colleagues that will be working alongside you for that shift.

In addition, for the assigned staff member, there are controls on this page to request cover, split the shift etc.

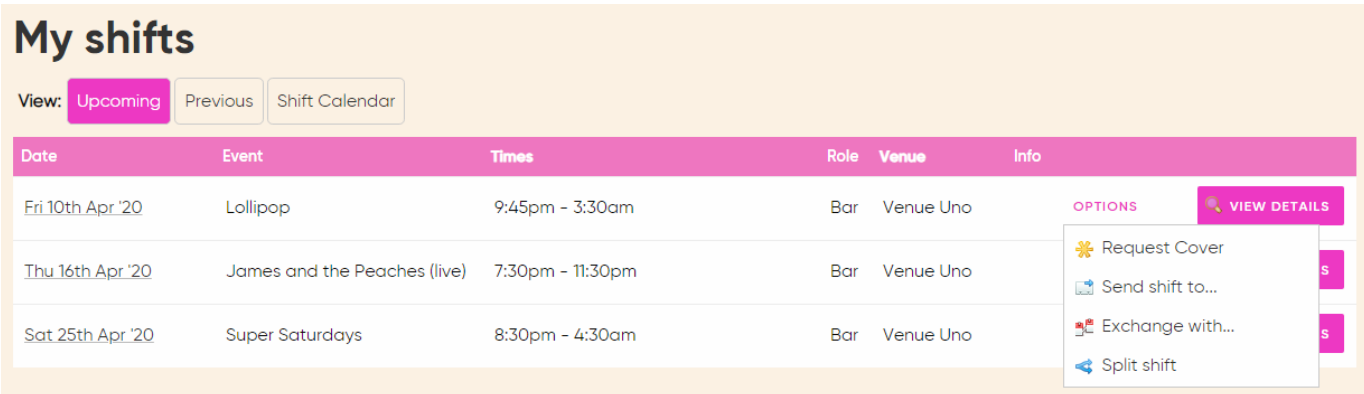
Once the shift has been worked, clock in information will also be displayed here providing a single-view for this shift.

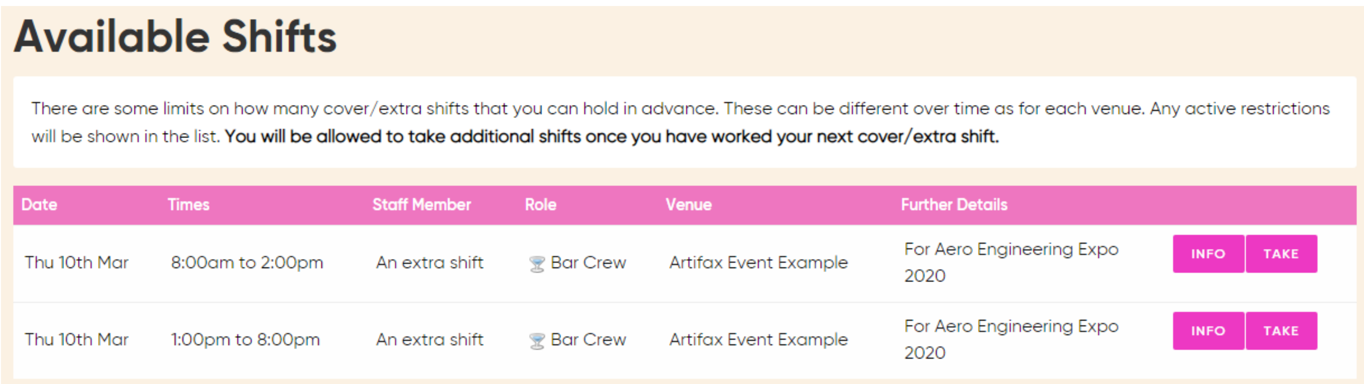
### 3.8.3.1. Requesting Cover

To request cover for your shift is very simple - click the Options button and then click “Request Cover” in My Shift that matches your Role for that shift can see that cover has been requested and can take the shift for themselves.

In the first image below, you can see that Daisie has requested cover for her shift on 11th August. In the second image, you can see that this is appearing on Rebecca’s Available Covershift list. To cover Daisie’s shift, Rebecca would click on the “Take” button, confirm that she is able to work, and then the shift would now appear in Rebecca’s calendar and be removed from Daisie’s.

Note: until a shift is taken by another staff member then you are expected to work the shift. You will still see it listed on your shifts and you will receive email reminders to work. If enabled, the site will also send you an SMS 2 hours before you shift to remind you if you do not have cover.

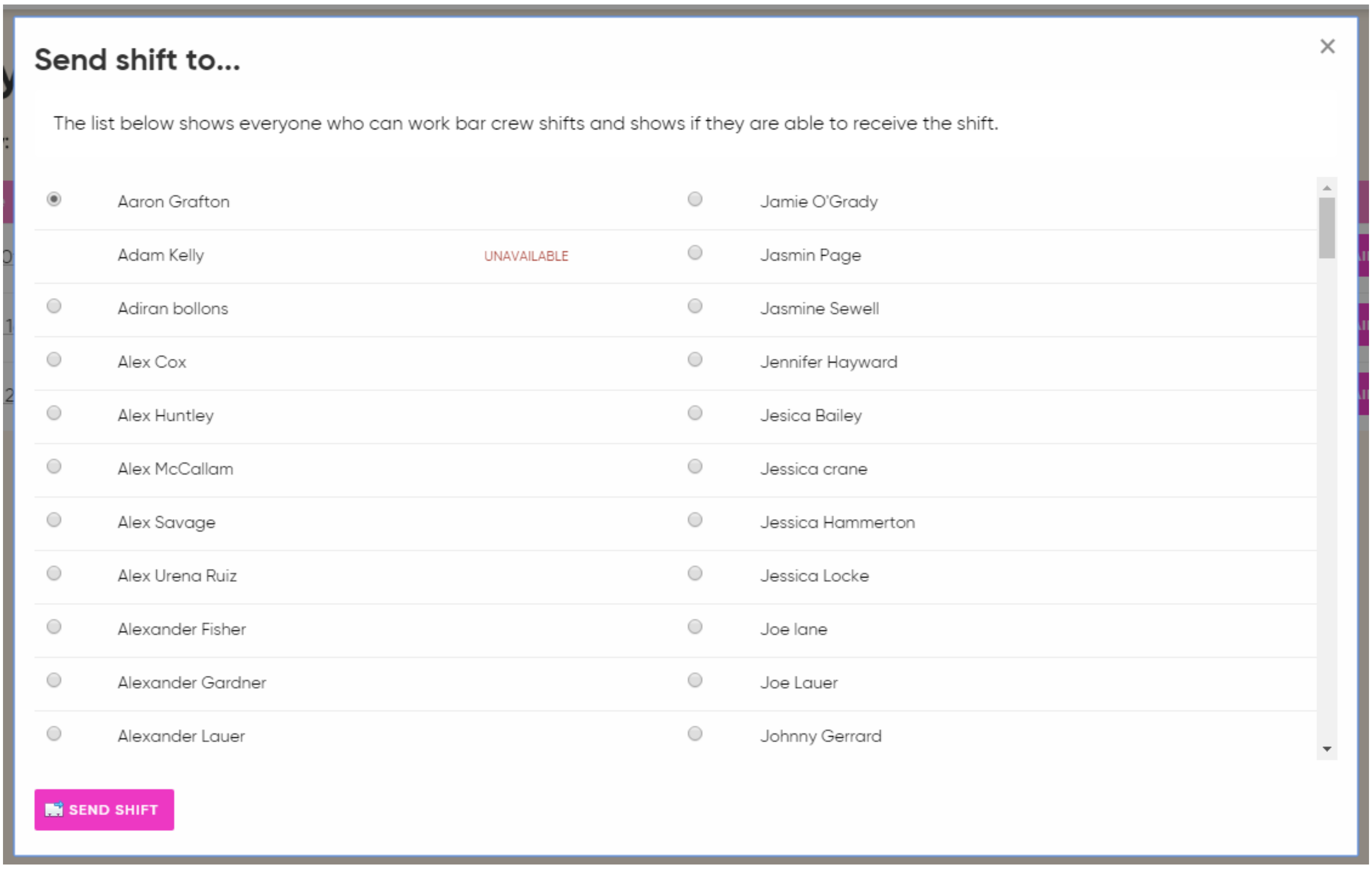


### 3.8.3.2. Sending Shifts

Instead of requesting cover, you are able to 'send' your shift to a specific member of staff. Here you can select the person that you would like to send your shift to, as well as seeing who is available. The recipient is then notified and can either accept or decline the shift. This option is great if you have personally asked someone to cover you; you can then send them the shift for them to accept.

Note: as per a normal covershift; you are still expected to work the shift until your colleague has accepted the shift from you.




Once you've sent your shift to someone, "Awaiting request response" now appears in the Info column next to that shift. In the event that you change your mind, you can cancel the request by clicking the "Options" button and then "Cancel Request".

### 3.8.3.3. Exchange Shifts

Exchanging shifts allows you to swap shifts simultaneously with another staff member. This is important for staff who are on strict hour limited contracts as they will not be able to take a shift first before giving another away (as they would go over their limit and this is automatically blocked).

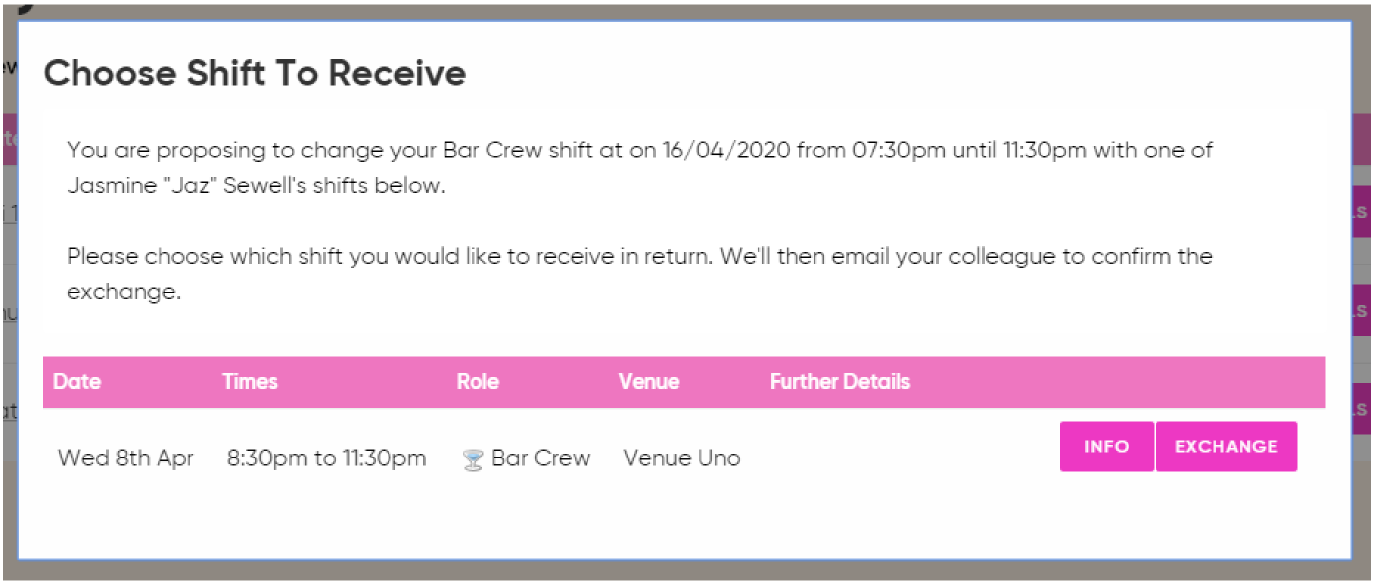
The exchange process:

1. You choose a shift you want to exchange.
2. Then choose a colleague to receive that shift.
3. Then choose a shift from the colleague you wish to receive in return.
4. Your colleague is now emailed with the proposed exchange.
5. Your colleague reviews the exchange and either approves or rejects it.

When approved, the swap is made instantly and simultaneously.

There is an additional restriction that means you cannot exchange shifts if the received shift is shorter and this means you would be under your contracted hours.

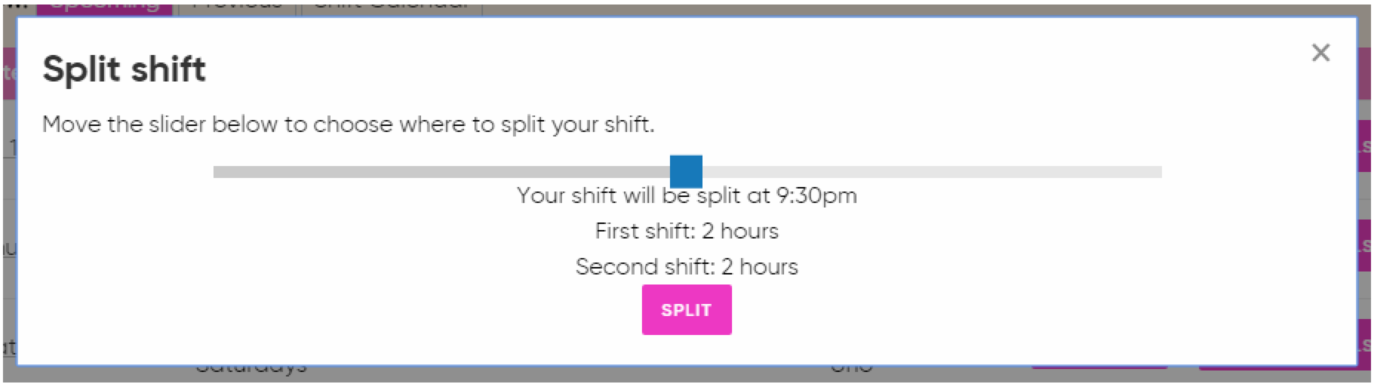
Exchange shifts and the association options are enabled under the venue/outlet settings.



### 3.8.3.4. Splitting Your Shift

To split your shift, click the "Options" button and then "Split shift". You now see a slide bar where you can determine how long your first and second shifts will last. When you're happy with the hours, click "Split" to confirm. Your shift list will now update to show two separate shift times for the same date. You can now proceed to request cover for only part of the shift.

Allowing staff to split a shift can be controlled under each Venue. You can set the minimum length of shift that can be split and the minimum lengths of the two halves that will be created. The option to split shifts is disable by default.




### 3.8.3.5. Relinquish Shift

This option allows staff to un-assign themselves from shifts without needing to find someone to cover them. The shift is not removed but marked as unassigned and available to cover.

This setting is <u>disabled by default</u> and can be enabled on each venue as needed. You can also set a limit as to how close to the shift start time this option can be used. For example, 'only allow this to be used up to 3 days before the shift starts', to allow time for someone to cover it.

### 3.8.4. My Personal Messages

Personal Messages are a secure, internal version of email. Unfortunately email is very insecure and they are easy to intercept and read their details. StaffSavvy provides the personal message service so that staff and managers can communicate securely; they also do not need to share personal details such as email addresses to do so.

Personal Messages can be sent to several staff members at the same time to provide group communications. Messages can be forwarded or colleagues added to the message thread.

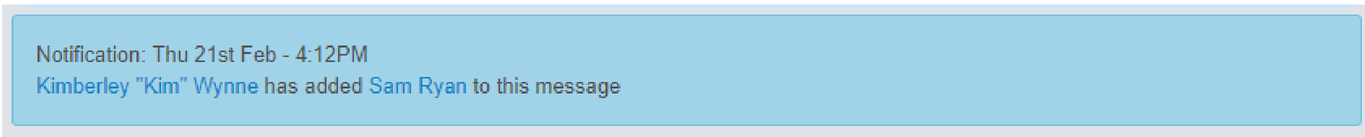
To start a personal message you can either go via a staff member's profile and click on the Personal Message button or you can go to My Account > My Messages and use the Actions menu to start a new message.

You can archive message threads that you no longer need. These will be hidden from your main inbox but you can access them under the actions menu.

#### 3.8.4.1. Reply and Add Staff Member

This option simply adds a staff member to the message thread (they will be able to see all messages) and adds a message.
To do this - go to My Messages and click the Open button on the chosen message.

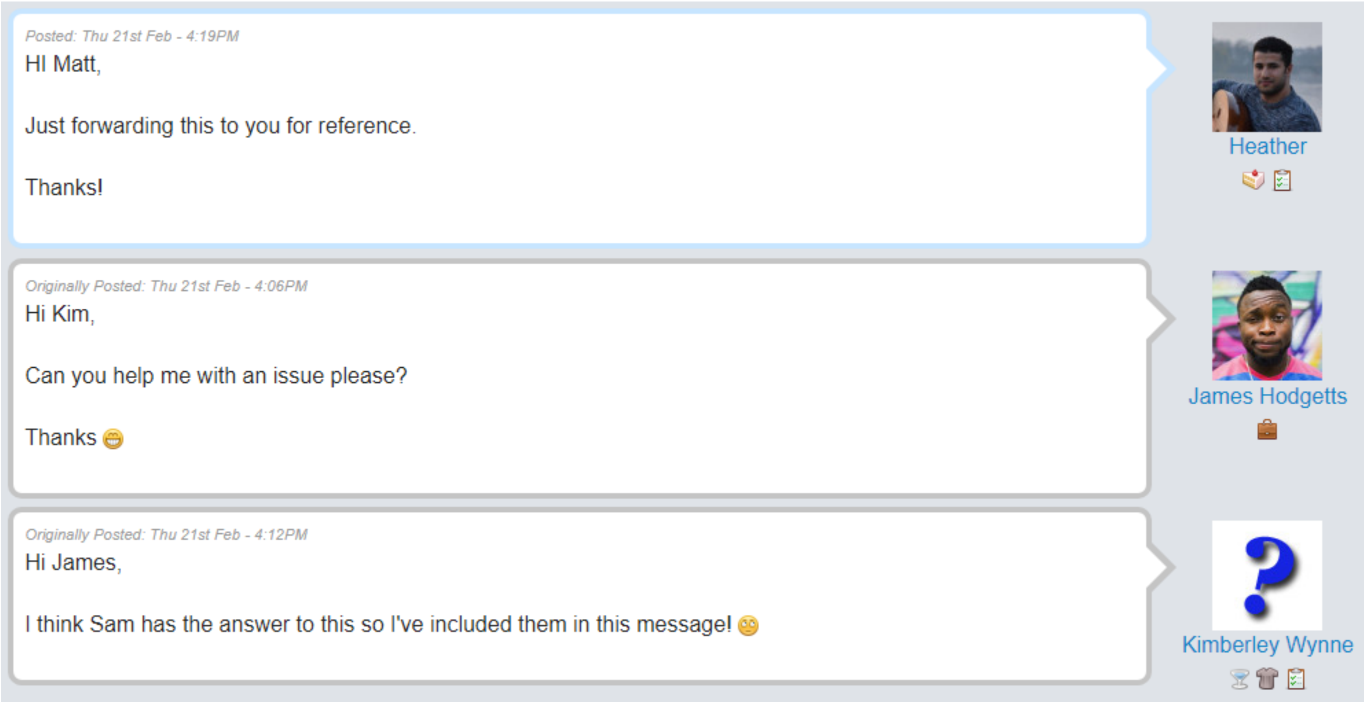
The other staff on the thread will be informed by a notification:




#### 3.8.4.2. Forward Message

When a message is forwarded, a full copy of the message is saved to the new thread. They are shown with a grey outline:




### 3.8.4.3. Delegate Message

Delegating a message allows you to forward the message to a different staff member and remove yourself from the message thread.

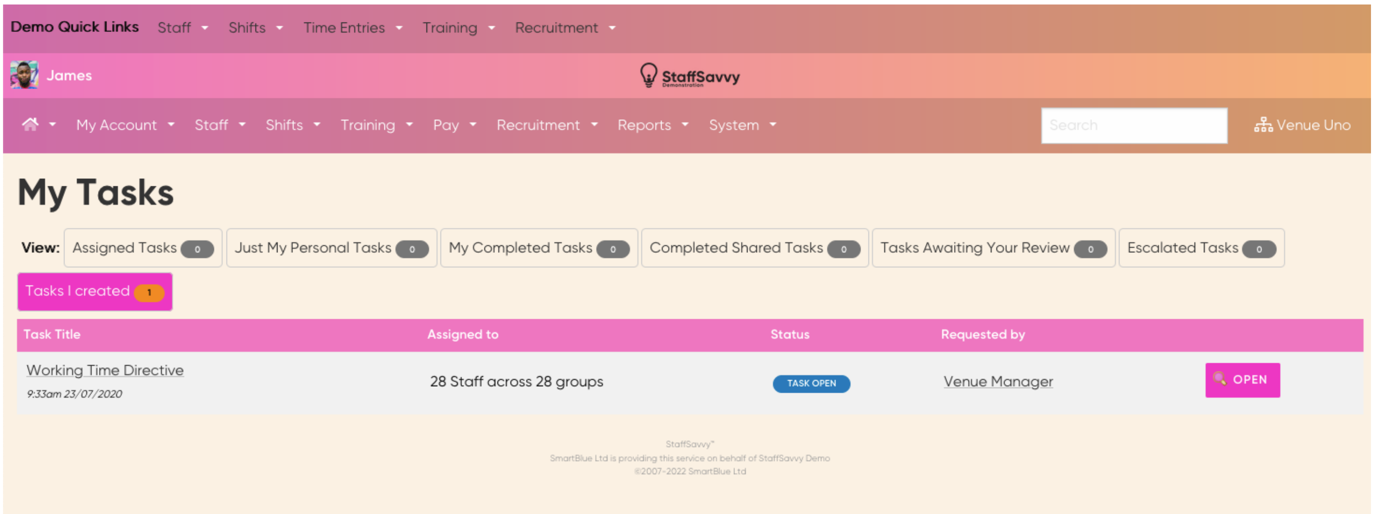
Staff will be informed via a notification in the message thread. Once delegated, you will not have access to the message unless you are added back in or it is delegated back to you.

### 3.8.4.4. Out of Office Message

The system will automatically display an out of office message if the staff member is currently on approved absence. This can be set up in the Action bar in My Messages.

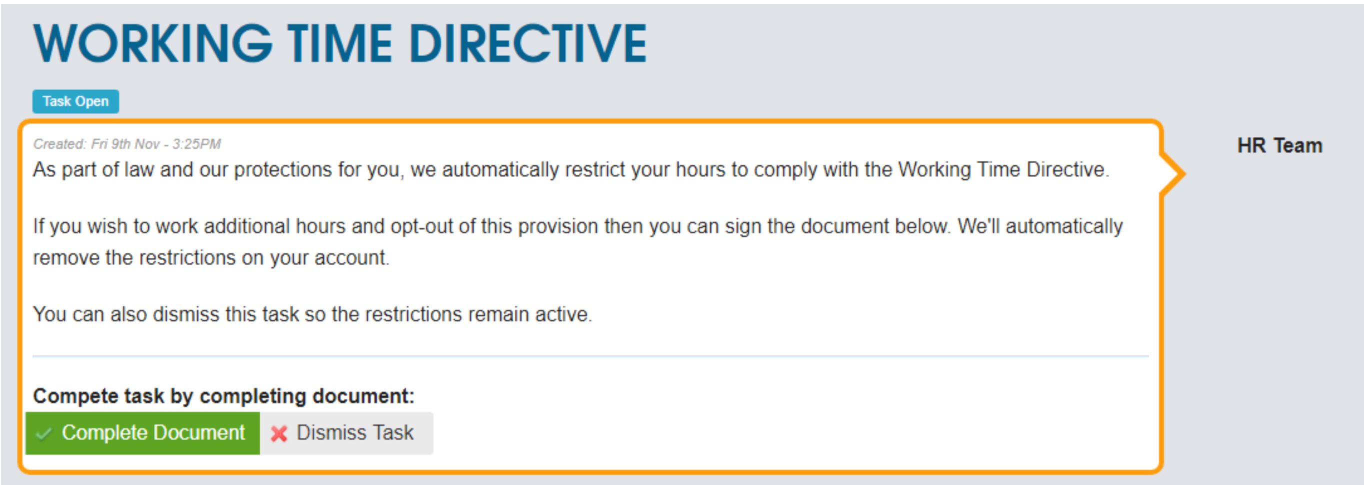
This allows everyone in the conversation to see that a staff member might not reply until they return.

## 3.8.5. My Tasks

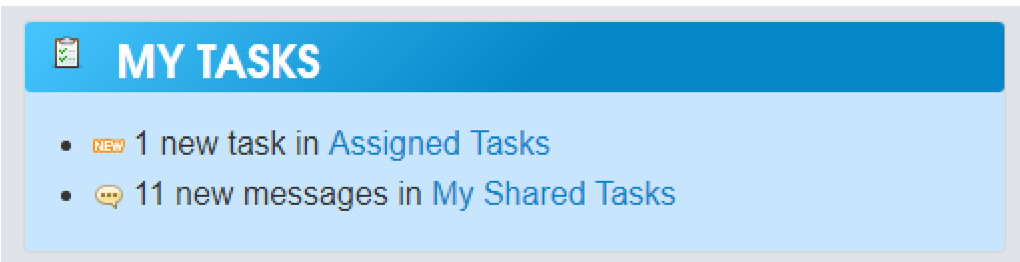



The My Tasks page shows both individual tasks and shared tasks for that staff member. You can also see at a glance any new tasks and any new messages on tasks that you have access for.

The example below shows a task that is offering staff the ability to opt-out of the working time directive. Staff can dismiss the task or follow the direct link to complete the opt-out document if they wish.




New or open tasks are also shown on your dashboard so you can see new tasks requiring your attention.



# 4. Staff Management

## 4.1. Basics

By default StaffSavvy treats all staff as casual staff with no restrictions on working. You can set employment details on an employee by assigning them to a Contract.

Rules about which roles/skills a staff member can do and which venues they can work at are still in force without a contract however no limits can be set, no regular hours setup, no TOIL management and no holiday entitlement.

This basis for staff allows you to get set up and using StaffSavvy quickly and then apply contracts to staff to achieve finer control over their employment.

Contracts are also where you can set if an employee is permanent, casual or contract. These options will change the features and reporting for the assigned staff. Only permanent and contracted staff can have regular hours, TOIL and holiday management.

You can assign contracts from the Dashboard > Pay > Contracts > Assign Contracts.

## 4.2. Understanding Levels

Levels is the most important setting in the site as a staff member's level will dictate what they can see and do within StaffSavvy. Levels are also placed in a hierarchy which means that staff can never increase their access or give higher access than they are to others.

Each level is assigned permissions and the permissions dictate what a staff member can do. All staff are shown the level of colleagues so they can see their authority within your organisation.

While the hierarchy of levels is linear and they must always be in a fixed order, the actual permissions assigned to each level can be vastly different. Levels do not inherit permissions from the level below them and can have a completely different set of access permissions. For example, a venue manager might have a significant number of permissions to manage their staff. Payroll staff might have far less access as they only need to process payroll but they will be hierarchically higher than a venue manager as they can see Pay for all staff.

## 4.3. Managing Access Permissions

StaffSavvy comes loaded with several default levels. These can be renamed and customised. Additional levels can be added and these default levels can also be removed.

Permissions can be assigned two different ways. via the Access Levels page where you can set which permissions the level has via the Dashboard > Staff > Staff Settings > Access Levels.
Or alternatively, you can use the Manage Permissions page where you can set which levels have access to a particular permission. Both methods do the same thing and can be interchanged.

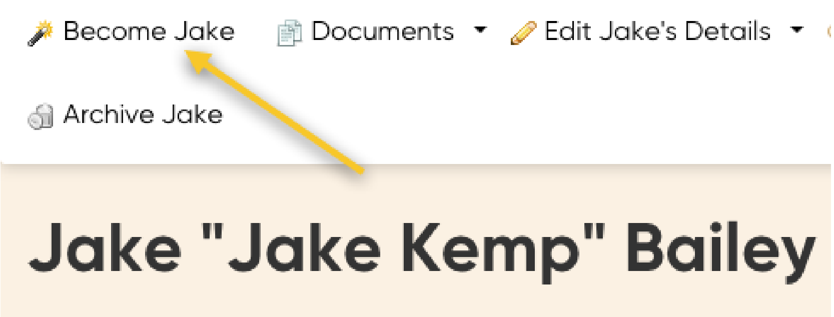
Navigate to this page through Dashboard > System > Configuration > Manage Permissions

The Manage Permissions page also has additional access levels that can be used on certain permissions:

- **Everyone**
  As you would expect, this option allows all staff to access this permission.
- **Staff have this permission for their own account**
  This allows staff to perform this action on their own account. Note that the staff member might have permission via the access level already.
- **Direct Line Managers Only**
  This allows line managers to have this permission on the staff they manage. It is only the direct line managers and anyone further up the line manager chain does not have this permission on this person.
- **All Line Managers**
  This allows line managers and everyone above them to have this permission on the staff they manage (directly on indirectly).
- **Venue Managers (for items within the venue they manage)**
  This allows staff who are venue managers to conduct the actions if the item is within their venue. E.g. permission to approve time entries within the venue they manage.

### 4.3.1. Testing Permissions

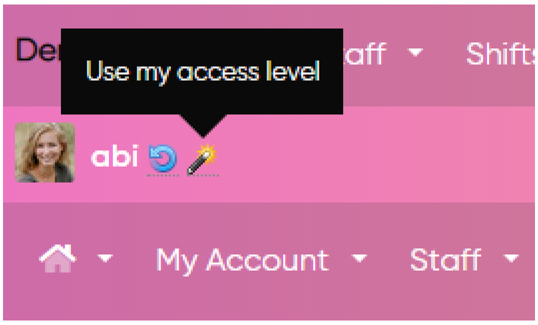
Testing the access levels of your staff is just as important as setting them up in the first place. StaffSavvy's permissions system is immensely powerful and flexible but this means you will need to double check the settings you have used.




System managers can use the "God mode" and "Become" a staff member to take control of a user's account. This will display the site as the selected user and their access level. This is perfect for checking permissions and ensuring they only have access to the information and functions you want them to have.

You can also view the site as that user but with your access level. There is another Magic Wand icon next to the user's image which allows system managers to view the user's account as them but also with either access level. Once enabled, you can use their account but with your access permissions (excluding line manager access permissions as this account might not be a line manager).




## 4.4. Venues

Each venue (ask StaffSavvy support to change this name) is a separate department or entity within your organisation. It will have separate managers, separate budgets and separate shift schedules.

You can create as many venues as you wish and each one of them can be managed in different ways.

### 4.4.1. Venue Settings

There are a lot of different settings on each venue that can control the tools available and the way the site behaves for shifts at that venue. Settings can be updated at any time and will take effect within a few moments.

This can be adjusted via Dashboard > System > Venues > Manage Venues > Edit Venue

#### 4.4.1.1. Details

- **Venue Title**
  The main title used throughout the site. This should be the full official department or venue name. Please ensure your venue titles are unique within the site to prevent confusion.
- **Venue Short Title**
  Shortened title to be used when space is tight. Try to use your existing acronym for the department/venue. Please ensure your venue titles are unique within the site to prevent confusion.
- **Venue Title for Staff**
  This is what staff will see on their shifts and time entries. It ensures they see a title/location that makes sense to them while you can set a title for admin use.
- **Display Colour**

Some reports and views make use of colours to show which venue a shift or time entry occurred at. Colours always include the short title as well but they help to separate venues at a glance.

- **Display Texture**
  Where we can't include the name of a venue, we'll likely include the colour and texture to allow you to easily see which venue each shift is taking place at.
- **Title for Exports**
  This is used for several of the bespoke export formats. You can set any title to be used in the exports. You can also set the same title for several different departments/venues and the exports will combine the figures for these venues into one line for your reports.
- **Sage Payroll Department**
  This will only display if you have the Sage Payroll service enabled.
- **Venue Groups**
  Venue Groups are a way to combine any combination of venues together for reporting purposes. Venues can be in any number of groups so you can venue reports from a single location or all venues of the same time across different locations. See Venue Groups for more detail.

### 4.4.1.2. Shift Configuration

- **New Shifts Notification Email**
  This determines how and when staff will be informed of new shifts. The shifts might be visible on the site before this email is sent (depending on the shift mode). This email is designed to help keep all staff informed. More details.
- **Staff Availability**
  - **Weekly Preferences**
    This sets how many different weeks of preferences staff are stored. **Start Date For Preferences** Select a date for the series of weeks to start. The weeks will repeat forever from this date. We'll change this date to the nearest Monday.
  - **Level of Detail**
    This allows staff to set their availability to a fine level of detail from between hourly, every 30 minutes or every 15 minutes.
  - **Maximum Reserved  Hours**
    How many hours each staff member can ask not to work each week.
  - **Minimum Gap**
    This allows for you to set a minimum gap of time that staff members have to take between blocks of reserved shifts. This helps prevent abuse of the reserved hours limit.
  - **Show Week Numbers**
    If you have multiple weeks, you can choose to include the week 'number'. This is helpful if it matches other schedules that use weeks or you simply want to label the weeks. The numbers will repeat once you reach the last week.
  - **Staff Choice of Hours**
    Allow staff to choose the hours they would like to work each week between their contract's expected hours and general limit.
  - **Remember Preferences**
    We'll remember the hours staff asked not to work last time so they only need to make changes

- **Lock Weekly Preferences**
  When enabled, this will prevent staff who are set to have this venue as their home venue from editing their weekly preferences. They can see the times they have set but not make any changes to it.
- **Reservable Hours**
  This setting allows you to control what hours Staff can reserve and blocks of time that will always be available.

- **Covershift / Extra Shift Restrictions**
  - **Allow Extra Shifts/Offered Shifts to be taken when locked**
    This setting allows unassigned extra or offered shifts to still be taken when they are locked. Once assigned, the shift remains locked so the staff member cannot request cover themselves.
  - **Allow Shifts to be Relinquished**
    Relinquishing shifts is the process of simply giving up a shift as setting it to be an unassigned/extra shift. This means the staff member has no further responsibility for the shift at all. It should be used carefully!
  - You can set how close to the shift start time that a staff member can simply give up the shift. If they fail to relinquish their shift before the set time, they will need to request cover instead.
  - **Relinquished Shifts Status**
    Choose what happens to relinquished shifts; do they return to being extra or offered shifts or specify the type of unassigned shift you want relinquished to become.
  - **Allow staff to post shifts for cover?**
    Allows staff to post their shifts for other qualified staff to cover. This will automatically make the shift available for any other staff member with the same roles and venue assigned to take and work.
  - **Cover Request Approval**
    This allows you to choose which cover requests you need to approve. We highly recommend you approve as few as possible to avoid delays, excessive management and other issues. Feel free to discuss this with our support team for more details.
  - **Allow staff to send cover requests to specific colleagues**
    Allows staff to send cover requests to specific staff. The recipient can either accept or reject the request.
  - **Allow staff to exchange shifts?**
    Allows staff to send cover requests to specific staff and choose a shift they want from the recipient in return. The recipient can accept/reject the request or offer a different shift in return.
  - **Number of cover/extra shifts which can be taken in advance**
    This setting overrides the Shift Ranges option that is set globally. It will restrict the number of covershifts or additional shifts that a staff member can take in advance. They will be allowed to take an additional shift once they have worked one of cover/extra shifts. This simply prevents one staff member from taking all shifts before other staff are able to choose the shifts they want to work. The staff member can always take additional shifts, they just can't take them all at once.
- **Arrival Times**

- **Arrival for Shift**
  You can set an arrival time on your shifts. This will be displayed in email reminders and on the shift details page. It will state the time the employee needs to be ready to clock in by taking the shift start time and deducting the set number of minutes from it.
- **Arrival Message**
  This message accompanies the arrival time and can be used to tell staff where to go or what not to have with them on duty (mobile phones etc). It's displayed on all shift reminders and on the shift details page.

* **Check In**
  - **Check In Form**
    This allows you to request a check in form to be completed before the staff member attends their shift. Note that only one form can be requested per calendar day.
  - **Time before shift**
    This only applies to Check in Forms and is the number of hours before the shift that we'll send the check in form request to the staff member via email and push notifications.
  - **Alarm Message**
    If the answers provided on the check in form trigger an alarm, the message provided will be displayed.
  - **Alarm Attendance Reason**
    If the answers provided on the check in form trigger an alarm, the system can update the shift non-attendance reason to be the selected option.

    **Note**: if you wish email notifications or tasks to be created when an alert is raised, this can be configured using a custom trigger. Our support team can assist with setting these up.

* **Operational Day / Timeline Settings**
  - **Day Start Time**
    This is what time your timeline will start on a given day. It's useful for departments that open late as you can see your full set of shifts in one view.
    This is also the setting that dictates what "day" a shift is displayed on. For example, if a shift works midnight to 4am you will probably think about it as being part of the schedule from the previous day. Using this setting, it will be included with all shifts from the previous day for reporting and editing.
    Ideally set this time to be before your first shift of the day.
    There are no limits to shifts and they can be worked beyond this time but viewing them on a timeline might be harder.
  - **Timeline Rounding**
    When using the shift timeline page it can be difficult to select the exact minutes you want to use for this. This setting will automatically round shift times so that you prevent shifts starting at 10:01am for example.
* **Shift Week Settings**

- **Staff Filter**
  This allows the system to display either just those based at the venue within the Manage Shift Week view or any staff member assigned to the venue.
- **Empty Day Message**
  This allows a custom message to be displayed on a staff member's week view for days that they have no shifts assigned.

- **Handover Period**
  This option allows your staff to be assigned or pick up shifts that overlap slightly. It's designed to allow a staff member who normally hands over to another staff member during an overlap to actually work both shifts. The system will automatically adjust the second shift so that its start time matches the finish time of the previous shift.
  Only shifts taking place at the same venue are eligible for the handover period.
- **Splitting Shifts**
  This option allows your staff to split their shifts into two parts with the primary purpose of putting one of the halves up for cover.
  You can set the rules around this by stating how long a shift must be to allow it to be split, the minimum length of each of the resulting shifts and the time period they can choose between the two halves.
-
  For example, I can set it to allow shifts of 6 hours or more to be split. Each half must be 2 hours or more and the staff member can choose which 30mins after 2 hours that the shift can be split. This will allow the shift to be split at 2 hours, 2 hours 30mins, 3 hours, 3 30mins or 4 hours. This will always leave the second part of the shift as at least 2 hours.
- **Schedule Generation Split Shifts**
  These settings are used with the Schedule Management tool and sets the rules on how the Split option will work.When enabled, the split option will take the full requirement and break it down into the max shift length set here.

  If any resulting shift will be less than the minimum length then the max length will not apply.
  If there are no staff available to fill the max length of shift then the length of the shift will be reduced by the Segment length and staff available will be checked again. If staff are available for the shorter shift then they will be assigned and the remainder time will be assigned out.

  If there are still no staff available then the system will repeat the process of reducing the shift length by the segment amount until the shift is filled or the minimum length of shift is reached.
  If no staff are available then you can choose to allow the system to only fill part of the requirement and unassigned/extra shifts will be created.

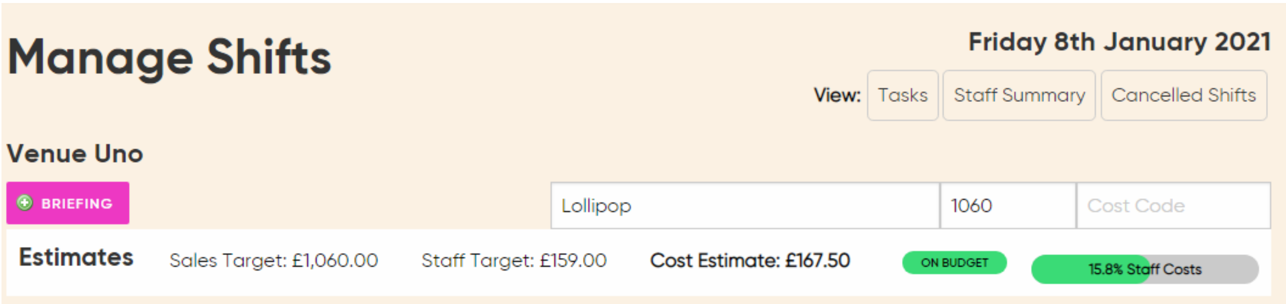
- **Shift Events**
  Shift events allow you to display the times of events taking place at the venue. This information will be displayed to staff members too.
  - **Shift Event Titles**
    This option allows for shift titles or notes to be added to a certain day within the site. All shifts for that 24-hour period at this venue will contain this title for staff and managers to see.

- ○ **Individual Events**
  This option allows you to either set an event title for a set of shifts based on times during the venue. E.g. "the event today is X" or "the event from 6pm is X".
  Or you can manually add the event title to each individual staff member's shift. This allows you to provide specific event related information to the staff member.
- ○ **Default Event**
  You can also set a default title to be shown if there is no title set. This might be "normal service" or "event TBC". You can also leave this blank.

- **Event Briefing Notes**
  Briefing notes work alongside shift events and budgets. They allow you to add notes for a whole day or a specific event. These notes are then displayed to the staff members working within those event times.

  Once enabled, ensure the events or budgets tools are enabled. You can edit the briefing notes on the Mange Shifts > Grid view page. A button marked "Briefing" will be displayed in the header area:




### 4.4.1.3. Clock In Configuration

- **Clock in Screens?**
  This option enables/disables the clock in screen features.
  When disabled, the system presumes that time entries will be copied from the shift schedule. All shifts will automatically be added as time entries to be reviewed, edited and approved.
  It's useful if you do not want staff to clock in/out but need to record hours worked.
- **Check in**
  - **Check In Form**
    This allows you to request a check in form be completed when the staff member attends their shift. Note that only one form will be requested per calendar day.
  - **Alarm Message**
    If the answers provided on the check in form trigger an alarm, the message provided will be displayed.
  - **Prevent Clock In**
    If the answers provided on the check in form trigger an alarm, do we allow them to continue to clock in?
  - **Alarm Attendance Reason**
    If the answers provided on the check in form trigger an alarm, the system can update the shift non-attendance reason to be the selected option.

- **Check In on Clock Out**
  This allows you to require a staff member to complete a basic form when they clock out.
  **Note**: if you wish email notifications or tasks to be created when an alert is raised, this can be configured using a custom trigger. Our support team can assist with setting these up.

- **Clocking In Settings**
  - **Allow Clock In**
    How early a staff member can clock in for a shift. This is when they will be displayed on the Awaiting column of the clock in screens.
  - **Paid Shift Start & End**
    These settings allow you to automatically adjust the clock in start and end times to match the planned shift times.
    Shift start simply sets the clock in times to be the planned shift times even if staff clock in earlier. When in use, this will display the staff member under the Clocked In list but will show their actual start time in the green box under their name.
    Shift end settings means that if someone clocks out just a few minutes after their shift ends then it will set the end time back to the planned shift times. Alternatively, these can be set so that Pay starts from the moment a staff member clocks in and finishes the time entry the moment they clock out even if longer than planned.
    Note that employment law is strict on what activities need to be paid for so speak to your HR and finance managers before adjusting this setting.
  - **Overtime**
    This allows you to set how much time past the end of the shift times should be considered as working excessive additional time. Shifts below this setting won't be flagged for additional review and will be considered "normal" for approval purposes.
  - **Clocking Back In For Shift**
    This allows a staff member to quickly be clocked back into a shift that is still ongoing if they have been clocked out incorrectly. You can choose how much time needs to be remaining on the shift to be able to use this option.
  - **Clocking Back In**
    This option applies to all staff who have recently clocked out on a screen. It allows for them to be clocked back in quickly and is perfect for correcting mistakes or restarting when they had expected to finish.
- **Break Settings**
  - **Allow Split Breaks**
    This allows a staff member to clock in and out for breaks so they can take a longer break in multiple parts.
  - **Paid Break Grace**
    Minutes over a set break that you allow staff to still be paid for before changing the additional time to unpaid.
- **Back to Back Shifts**
  - **Automatically clock in/out**
    Allows the system to clock a staff member out and back in with different cost codes, roles and tasks if their shifts are back to back.

- **Lateness**
  This is the grace period after the shift start time that the staff member can still clock in and not be late. Once this has passed, their button in the Awaiting column will be flagged as late and they will be reminded that they are late when they clock in. The shift will also automatically be flagged as Late for reporting. You can see which non-attendance reason is used for this lateness flag under Global Settings.
- **Clock in screen changes**
  This option allows you to choose which venues can staff be manually transferred to within that clock in screen. This allows managers on shift to move staff around using the screens and instantly record changes in venues and roles.

### 4.4.1.4. Budgets

- **Enable Budget**
- **Enable/Disable budgeting**
- **Budget Period**
  This dictates whether you use daily or weekly budgeting when calculating estimates.
- **Shift Pay Elements**
  This dictates where the staff costs should be calculated from; either actual staff rates or the set budgeting cost defined in the skills/roles.
- **Target Origin**
  Where should the budget target come from:
  - **Simple Budget**
    You set an actual staff cost you wish to hit in your currency.
  - **Percentage of Sales**
    You provide a sales estimate and the staff cost is a percentage of the expected sales
- **Budget Percentage**
  Only used with the Sales Percentage Target, this is the percentage of the sales that should be spent on staff costs. 15% for example
- **Acceptable Deviation**
  Percentage up or down from the target that is acceptable and considered “on budget”.  When set to 5%, any value between 95% of the budget and 105% will be marked as on budget.
- **Actual Figure Display**
  Only used with the Sales Percentage Target, this decides if the budget should show a percentage to the budget the actual staff cost percentage. For example, if my staff costs are exactly 15% of the sales target then this will either show 100% (exact target) or 15% (the actual staff cost percentage).

### 4.4.1.5. Roles

This tab allows you to set which roles you want to use within this venue. This simply allows you to keep the list of available roles more relevant to your venue.

### 4.4.1.6. Tasks

This tab allows you to set which shift actions you want to use within this venue. This simply allows you to keep the list of available actions more relevant to your venue.

You can also choose to hide all actions/tasks from your staff when they access their shifts via the system. This means they will not see the task for their shift. This will also affect all calendar feeds and emails about these shifts.

Setting the tasks to be required means that all shifts must have a task assigned when being created in this venue. The “n task” option will not be available.

### 4.4.1.7. Employment Eligibility

This field allows you to override the default message set under Global Settings. This means you can bespoke where the staff members based at this venue should take their documents to be checked.

### 4.4.1.8. ArtifaxEvent Configuration

This tab will only be displayed if Artifax integration is enabled on the system.

For details on the options, see Artifax Event Integration.

## 4.4.2. Copy venue configuration to a venue group

This allows you to copy all or parts of the configuration from one venue to all venues within a venue group that you have access to. Go to System > Venues > Manage Venues. Click More and choose Copy Configuration.

This will then show a popup box where you can choose the venue group to copy the configuration to. You can also choose which tabs you wish to copy so that you can just update the details you wish.

## 4.4.3. Venue Staff and Access

Access to a venue must be granted. There are three ways this can happen.

### 4.4.3.1. Full Venue Access Permission

There is a permission that allows staff to see all venues all of the time. This grants them access to the venue in a technical sense. They might not have permissions to actually do anything at that venue nor have any roles/skills assigned that allow them to work at the venue. This permission can be granted via System > Configuration > Manage Permissions > Venues: Automatic access to all Venues.

This option is useful for casual staff who might want to offer additional shifts or unskilled shifts to any staff in your organisation. It’s also useful for System Managers who need access to everything.

StaffSavvy

### 4.4.3.2. Home Venue

Every employee must have a home venue. This is where they are based and will grant them access to this venue. This will also dictate who their default line managers are. See Venue Managers and Line Managers.

Home Venues are assigned via the Authorisation page, Staff Member's Venues or Manage Staff.

### 4.4.3.3. Assigned Venues

Every employee can also be assigned individual access to certain venues. This can be accessed via the staff member's profile page or via System > Venues > Manage Venues  (Venues might be replaced with your own name for a venue).

### 4.4.4. Venue Managers

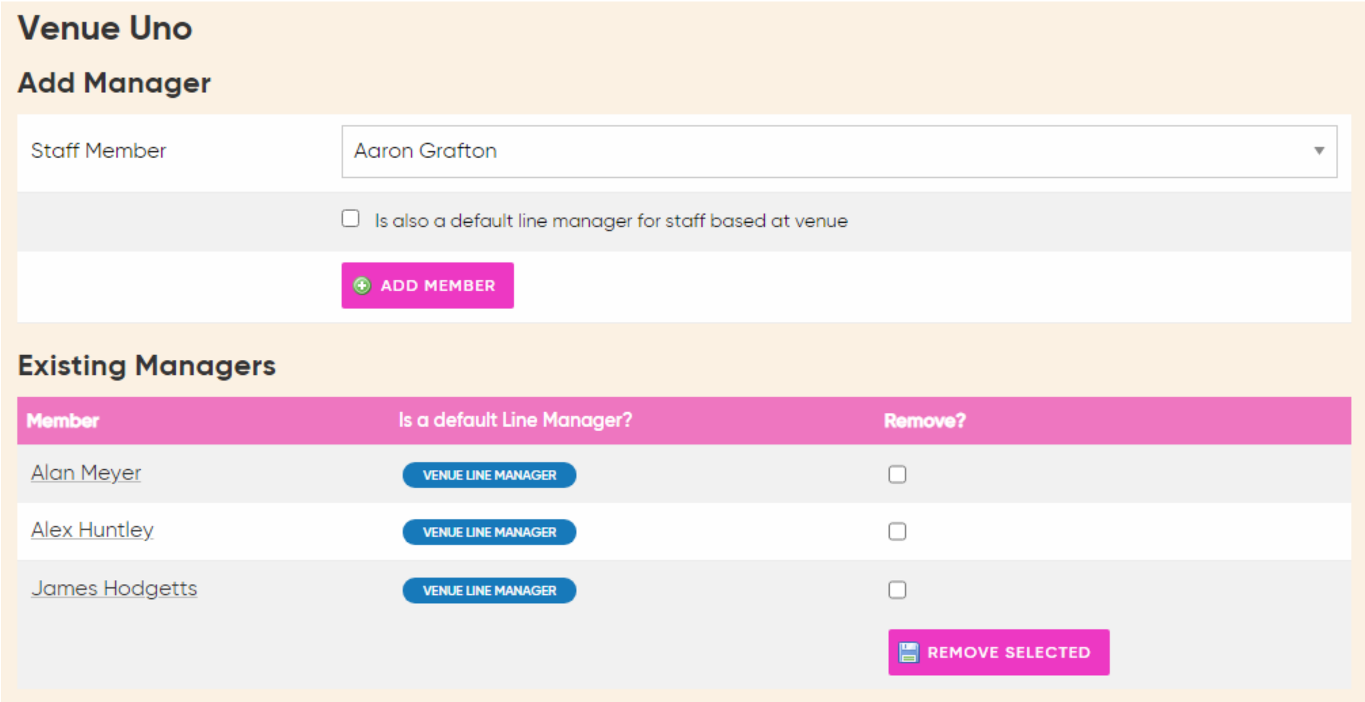
Venue managers are individuals who have special access to that venue. Managers can also be set to be the default line managers for all staff that have this venue set as their home venue. Different line managers can be set for each staff member under their profile page.

Venue managers are also displayed on different pages as the venue's managers.

When adding a venue manager, carefully decide if they should be a default line manager or not. If they are a line manager then this could provide them access to private and personal details that should be protected. It might also grant them permission to make changes to staff accounts and approve requests.

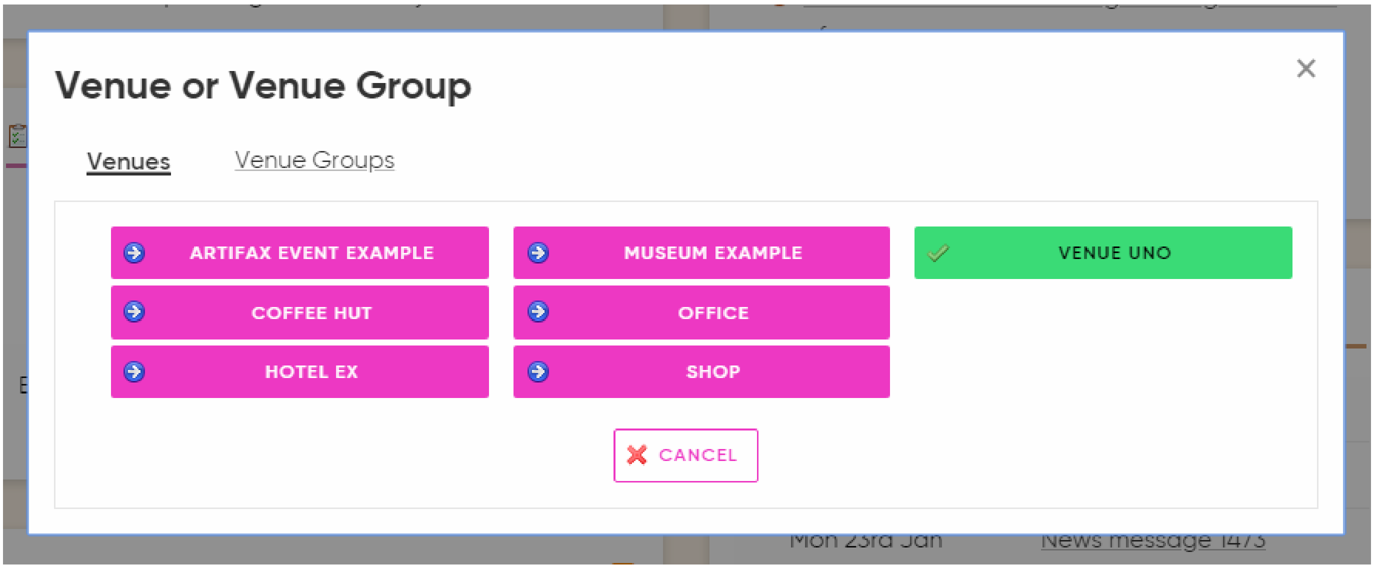
If they are not a default line manager then this can be used to grant them management access for shifts and time entries within the venues they help manage.




### 4.4.5. Managing Different Venues

If you have access to different venues then you can jump between them using the button in the top right of the screen.

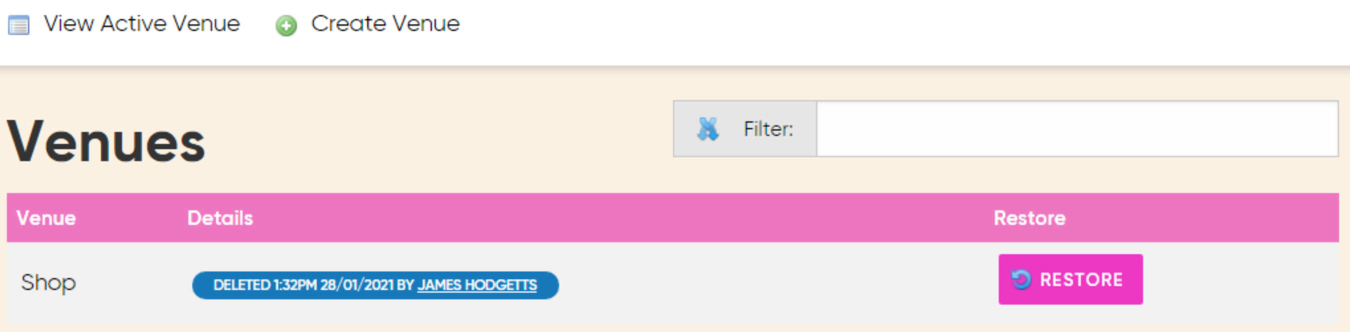



### 4.4.6. Restoring a Deleted Venue

If you have deleted a venue for any reason, it will have moved to the Deleted Venues List. You can only delete a venue if there are no staff member's currently based at that venue.

If you need to restore a venue, use the 'View Deleted Venues' option in the Actions menu on the list of venues.

This will show you a list of all deleted venues along with details on who and when they are removed. You can also restore them from this panel.




## 4.5. Editing Staff Details

Access to edit most staff details can be accessed under the staff member's profile page. The exact options visible will depend on the access level and permissions for that staff member.

With full access you will be able to see the following from the profile page:

- Edit details
- Edit roles

- Edit venues
- Edit regular shifts
- View Employment Eligibility status
- View all documents
- Change line manager
- Create a personnel record entry for employee
- Manage Bonus Covershift Credits (see Shift Ranges)
- View various reports
- View their weekly availability preferences
- View holiday & absence reports
- Transfer all shifts (to a new staff member or extra shifts)
- View training progress
- Archive staff member (to remove them)

# 4.6. Staff Roles

Note: You can choose to call these items either roles or skills; contact our support team to change this.

## 4.6.1. Understanding Roles

Roles are the cornerstone of all shift and timesheet management within StaffSavvy. A role is a group of staff who are all interchangeable for a particular job or task. For example, you might have Bar Staff as a role.

Everyone who is assigned to that role is considered equal and interchangeable. If they are not then they need to be split out into smaller roles. Senior Bar Staff and Junior Bar Staff for example. You can have any number of roles; the key is that everyone assigned to that role/skill is interchangeable with everyone else.

Roles are used to easily categorise people into shifts (e.g. fill this shift with anyone that has the role Senior Bar Staff) and also for swapping shifts (e.g. only staff who are assigned to the same role will be able to take the shift).

## 4.6.2. Pay for Role

There are four options for paying staff for a shift; pay per hour, pay per item (e.g. per shift), pay on-call (fixed pay per instance plus an additional paid time if needed) and hourly with fixed value (allows the hours to be reported but only a fixed pay item is paid).

Simply choose the option that matches the general payment process for that role.

Note: Salaried staff should use a pay per hour rate set to 0. This allows the hours to be calculated and recorded but no additional financial costs associated with the time entry.

Pay per hour payments means the staff member will be paid an hourly rate for the exact time worked after breaks and adjustments.

Pay per item means that regardless of the length of shift scheduled, the staff member will be paid one pay item for that “shift”. It’s important to only use this when absolutely necessary. Most combinations of payments can be archived with pay per time (including minimum payments, automatic double time etc).

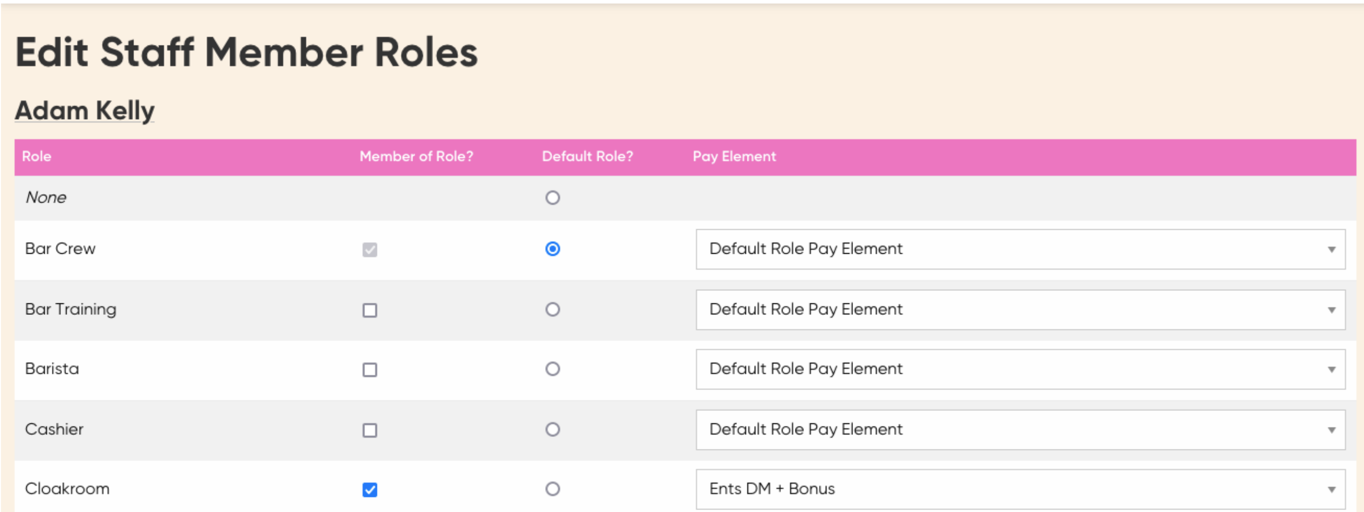
On-Call shifts use a combination of both; there is a fixed pay item per shift which is always paid, plus the option to add additional hours at an hourly rate. The additional hours can be added when editing the time entry once it’s been added and allows for additional travel or active time to be paid on top of the fixed amount.

Hourly with fixed value is for special circumstances where staff need to be paid a fixed value for a shift but you also need to report the actual number of hours worked as part of the shift.

### 4.6.2.1. Pay Element Rates and Roles

Each role has a default pay element. This is the hourly rate the staff member will be paid when working a shift in this role.

If the staff member should be paid a different rate of pay then you can override the default pay element when managing their roles. In the example below, Adam is being paid a special rate whenever he works a cloakroom shift.

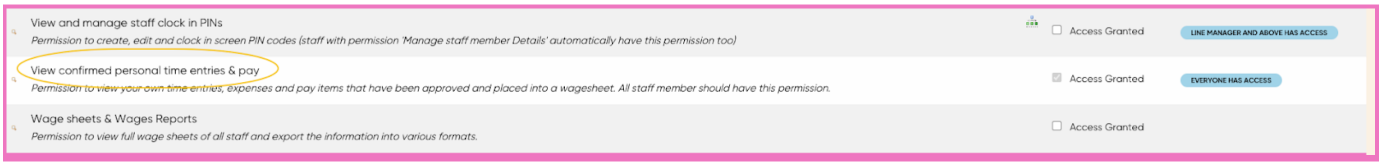



You can also configure automatic changes in rates based on factors such as time or age. See more in pay elements.

## 4.7. Adding display for hourly rates on profile pages.

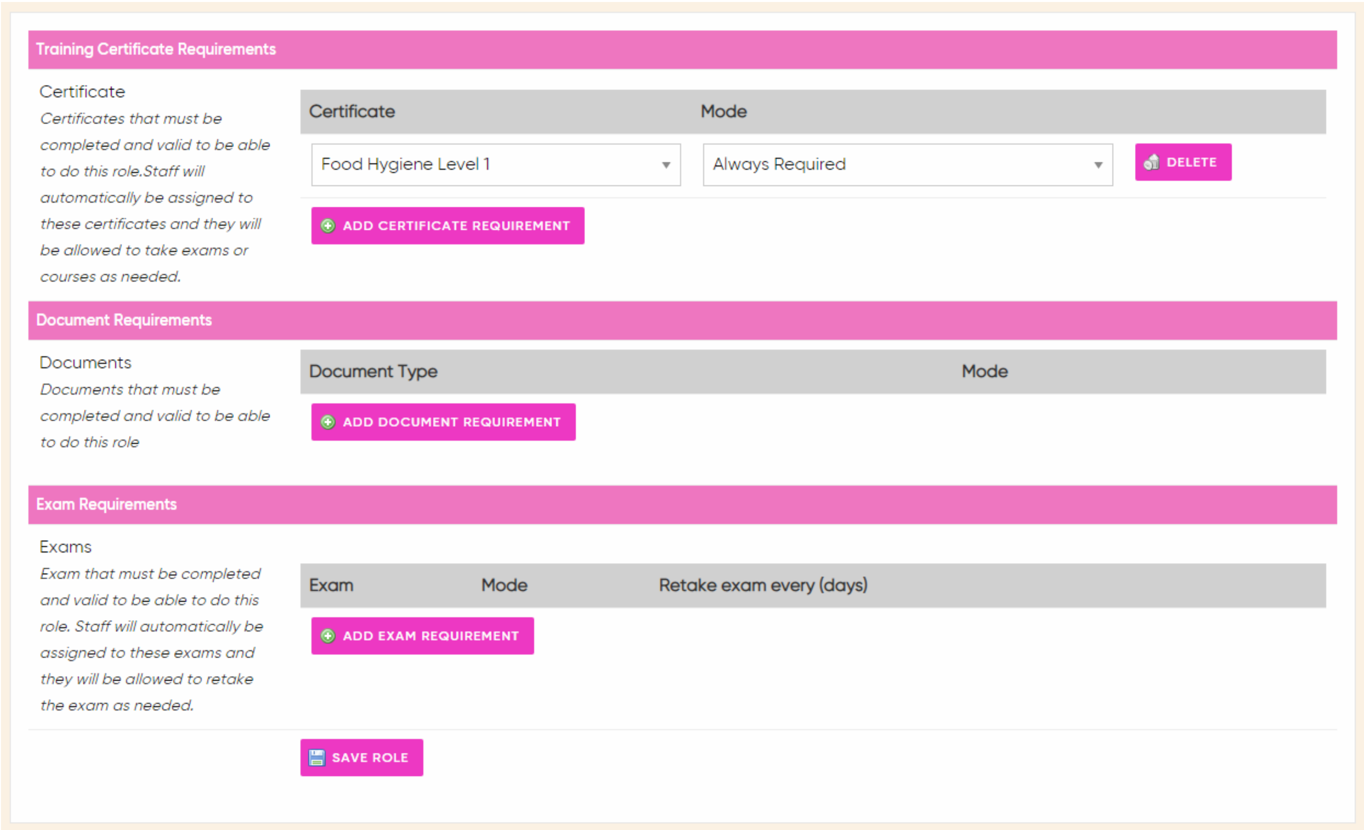
You can now display hourly rates on a staff member’s profile. This includes a new ‘View Pay’ Permission. This should already be enabled but to ensure this has been enabled go to Manage Access Permissions and find under

Clock in, Time Sheets, Pay & Expenses. This permission will be expanded to cover the protection of all pay displayed within the system; currently it just covers the new features.




### 4.7.1. Role Requirements

There is the option to stipulate requirements to work on a role/skill. The requirements mean staff must have all of the requirements completed to be able to be scheduled for shifts with that role/skill.
This can be altered via Staff > Staff Settings > Staff Roles > Edit > Requirements.



Be warned that changes to the requirements are applied instantly. This might prevent some staff from working until the requirements are met. It is advisable to have the requirements completed before adding the requirements to the role/skill.

You can set the mode to be “Requested, not required” and this will warn staff to complete the items listed but will still allow them to access shifts.

### 4.7.1.1. Requirement Options

#### 4.7.1.1.1. Training Program Requirements

With this requirement, staff must have completed the required training program (and all the parts it contains). The expiry settings on the training program will ensure staff keep their training requirements active to have access to the role. Additionally, you can add here a Certificate requirement, if a formal certification is required for the role.

#### 4.7.1.1.2. Training Requirements

With this requirement, staff must have completed the required training.
The expiry settings on the training stage will ensure staff keep their training requirements active to have access to the role.

#### 4.7.1.1.3. Document Requirements

Document requirements mean staff must have supplied documents uploaded to the site to be active in this role. You can create any number of document types and place requirements on the documents such as requiring management verification.

On the document type, you can also stipulate that an expiry date is needed. This therefore requires managers to confirm the document expiry when it is uploaded.

The site will automatically ask for a replacement document once the document expiry date approaches.

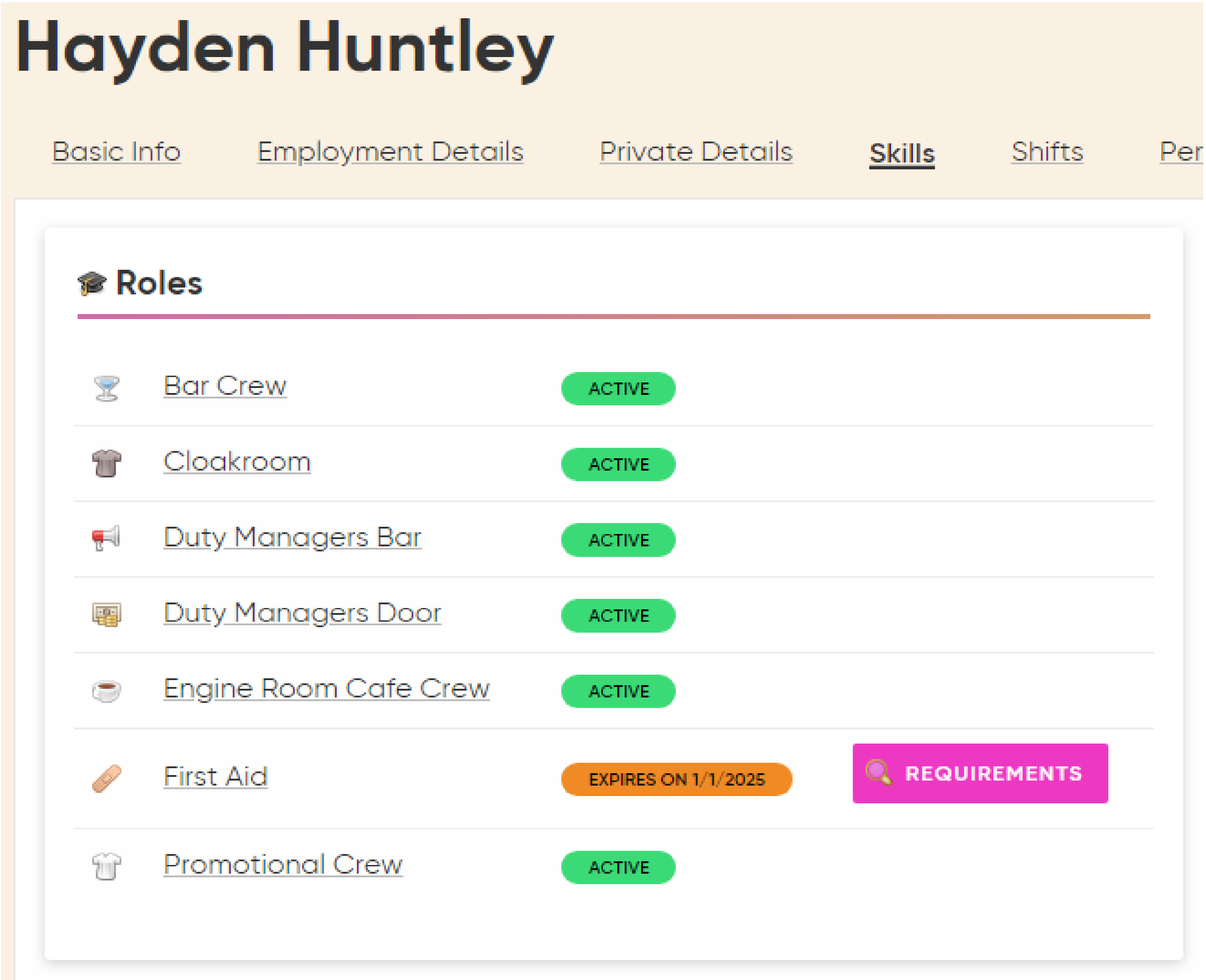
#### 4.7.1.1.4. Exam Requirements

This allows you to specify exams that staff assigned to the role must complete to work in the role.
You can also specify an expiry period that staff must retake the exam. This allows you to ensure staff repeatingly take this exam at regular intervals.

### 4.7.1.2. Staff Point of View

Staff will be informed via email if the requirements change on their roles/skills. A warning is also displayed on their dashboard and my shifts pages if the staff member’s requirements are missing or are due to expire.




### 4.7.1.3. Requirements Report

This report is available for each role and displays all staff assigned to that role. Next to each staff member is a current status for their access to that role:

- **Active (with any expiry dates)**
  They can be assigned shifts for this role. If there is an expiry date shown then this is the limit that they can receive shifts until new documents, training or exams are uploaded or completed that extends the expiry date.
- **Inactive: Requirements not met**
  They cannot currently be assigned shifts for this role as one or more of the required items has not been completed or has expired.

Across the rest of the page is displayed all of the requirements and the status for each of the staff members. This allows you to see at a glance who has completed which items and which items expire on each date.

The options for each of the requirements per staff member are:

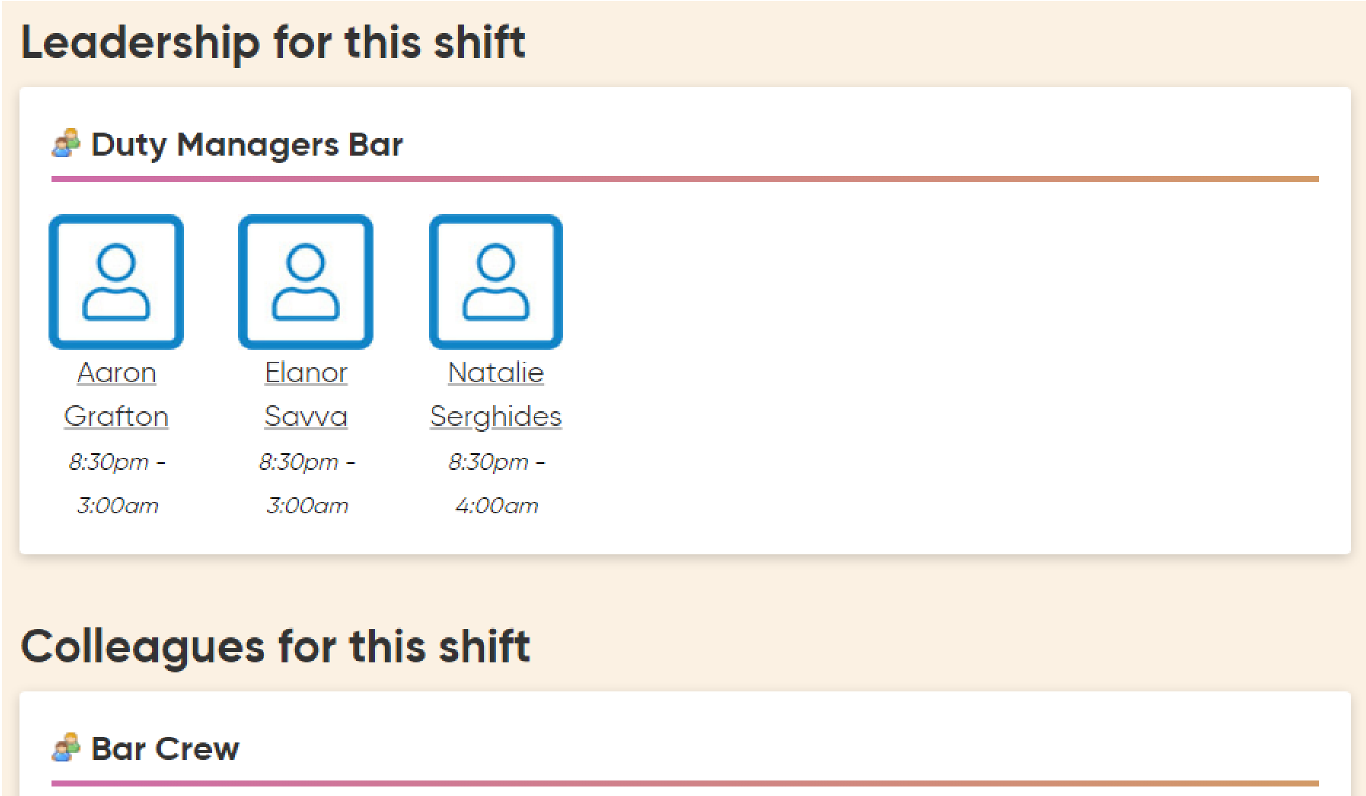
- **Complete**
  The item has been completed and has no expiry date
- **Complete: expires X**
  The items has been completed and expires on the given date
- **Not provided or not yet verified**
  The item is outstanding; they might have provided the document but it's not yet been checked or simply they haven't completed the requirement at all.
- **Not required, not complete**
  The requirement has not been completed but it's marked as "Requested, not required" so it does not block access to working the shifts

**Barista**

| Name | Status (Summary) | Certificate: Food Hygiene Level 1 | Document: Working Time Directive Opt-Out Agreement |
|---|---|---|---|
| Alison Camps | ACTIVE: EXPIRES 28/01/2022 | COMPLETE: EXPIRES 28/01/2022 | NOT REQUIRED, NOT COMPLETE |
| Angus Forbes- Martin | INACTIVE: REQUIREMENTS NOT MET | NOT PROVIDED OR NOT YET VERIFIED | NOT REQUIRED, NOT COMPLETE |
| Ava Ashurst | INACTIVE: REQUIREMENTS NOT MET | NOT PROVIDED OR NOT YET VERIFIED | NOT REQUIRED, NOT COMPLETE |
| Dinis Brown | INACTIVE: REQUIREMENTS NOT MET | NOT PROVIDED OR NOT YET VERIFIED | NOT REQUIRED, NOT COMPLETE |
| Lauren Puxley | ACTIVE: EXPIRES 28/01/2022 | COMPLETE: EXPIRES 28/01/2022 | COMPLETE |
| Marita Osunsanmi | INACTIVE: REQUIREMENTS NOT MET | NOT PROVIDED OR NOT YET VERIFIED | NOT REQUIRED, NOT COMPLETE |
| Melissa Ingram | ACTIVE: EXPIRES 28/01/2022 | COMPLETE: EXPIRES 28/01/2022 | NOT REQUIRED, NOT COMPLETE |
| Rebecca Madge | INACTIVE: REQUIREMENTS NOT MET | NOT PROVIDED OR NOT YET VERIFIED | NOT REQUIRED, NOT COMPLETE |
| Scott Murray | INACTIVE: REQUIREMENTS NOT MET | NOT PROVIDED OR NOT YET VERIFIED | COMPLETE |

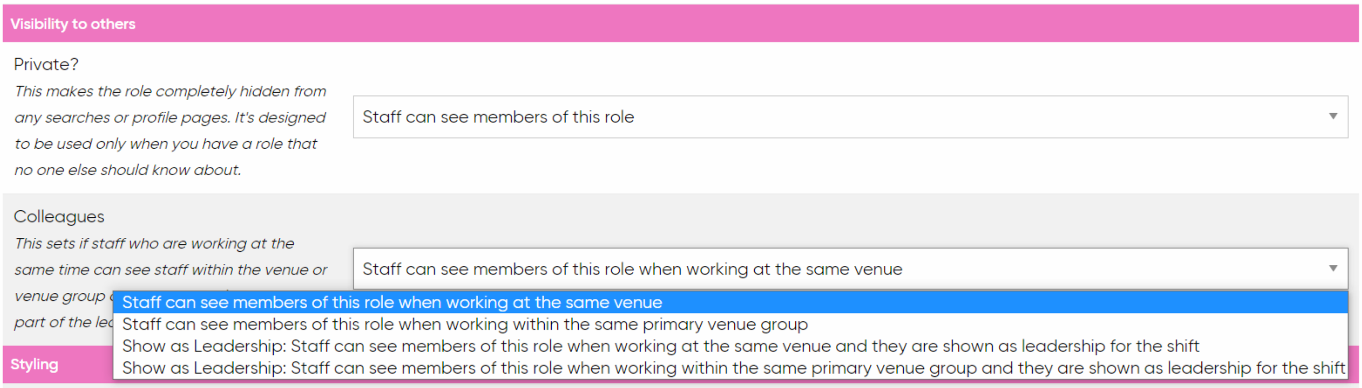
### 4.7.2. Display Leadership Team for a shift




You can split the colleagues section on the shift details page to show different roles as the leadership role for that shift.

In addition, you can now display leadership staff from any of the venues within the same primary venue group. This allows staff who might be assigned to a different venue to still be shown on the shift details page as either colleagues or as leadership for the shift.

Under Staff > Staff Settings > Staff Roles, edit the role you wish to display. Under the General Settings tab, change the Colleagues section to change how and when those shifts are displayed.

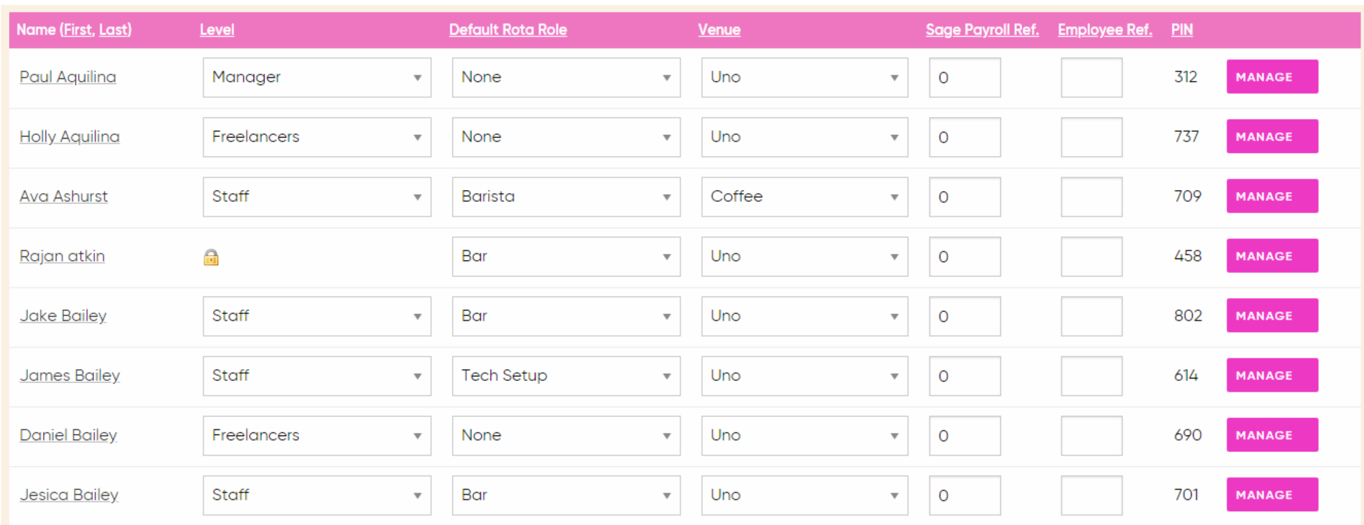



## 4.8. Manage Staff

This page allows for quick updating of information that only managers can set: staff levels, home venues, default roles, employee references and numbers plus PIN codes.

Different permissions can be set to allow certain staff access to different areas to this page. Only staff within venues that the manager has access to will be displayed. They will not be able to edit staff who are based at different venues.
Equally, managers can only edit the level of staff that are currently set to their level or below. High access staff members will have their level locked on this page.

If you have senior managers who need access to each venue but you do not want the venue managers to be able to see or edit their accounts then create an “admin” or “head office” venue and set this as the home venue for your senior managers. They will now not display for any junior managers as they are not based within one of the venues they look after.



| Name (First, Last) | Level | Default Rota Role | Venue | Sage Payroll Ref. | Employee Ref. | PIN | |
|---|---|---|---|---|---|---|---|
| Paul Aquilina | Manager | None | Uno | 0 | | 312 | MANAGE |
| Holly Aquilina | Freelancers | None | Uno | 0 | | 737 | MANAGE |
| Ava Ashurst | Staff | Barista | Coffee | 0 | | 709 | MANAGE |
| Rajan atkin | | Bar | Uno | 0 | | 458 | MANAGE |
| Jake Bailey | Staff | Bar | Uno | 0 | | 802 | MANAGE |
| James Bailey | Staff | Tech Setup | Uno | 0 | | 614 | MANAGE |
| Daniel Bailey | Freelancers | None | Uno | 0 | | 690 | MANAGE |
| Jesica Bailey | Staff | Bar | Uno | 0 | | 701 | MANAGE |

# 4.9. Tasks

Tasks are a useful feature to help your automated workflows. Tasks are designed to be automatically created and assigned to staff to be completed.

Tasks can be assigned to individuals or to groups of staff such as teams or roles. This allows everyone assigned to access the task and complete it. It’s perfect for HR tasks automatically created by triggers.

Tasks can either be completed or dismissed (if allowed). You can decide who is allowed to mark tasks as complete; either the individual staff member completes an action such as a document, they can be allowed to manually mark them as complete or they can be escalated to the task issuer for them to accept.

For example, a task might require the assigned staff member to provide some information. Once supplied, the task is escalated to the issuing group which is the HR team. They can then review the information and either reject the task and assign it back or mark the tasks as complete.

Another example is a task that would require staff to provide proof of their bank details once they provide or update them. The task will direct the staff member to the upload page to provide the document. Once provided, the task will be marked as complete automatically.

Tasks also include the option to have a full conversation within the task between the assigned staff members and the task issuers (such as the HR team). This allows for clarification or communication about a task.
Tasks can be set by role, day they apply to, teams and access levels.

Tasks will normally be created by a trigger but you also have the option to create tasks manually under Staff > Create Tasks.

# 4.10. Contracts

A contract in StaffSavvy is a set of rules to govern the employment of a staff member. A contract can include online signature of a contract document or it can simply be used to match a physical contract handled offline.

Contracts can be assigned to cover just specific roles on an employee or cover all roles. This allows a staff member to be contracted for specific hours on some roles and also be a casual staff member for other roles.

## 4.10.1. Contract Types

Contract types allow you to group different contracts together for reporting purposes. They also allow you to change how the system refers to a contract for those staff members on the contract.

For example, employees will see it called a Contract. Volunteers might have it called terms and conditions etc.

On the Manage Contracts page, you can use the Edit Contract types option in the actions menu to edit, add and remove contract types.

## 4.11. Contract Types: Additional emails notes

Additional email notes can now be added to all shift emails automatically based on contract types. So freelancers can receive Terms and Conditions directly in their email notifications automatically.

This can be done when creating a contract type by going to Pay > Contracts > Manage Contracts. From here go to 'Manage Contract Types' from the actions menu. From here there is the option to 'Add a New Contract Type' from the action menu.

From here you can add any notes specific to contract types or attach a form. This is useful for freelance contracts where there may be forms that need to be added automatically .

### 4.11.1. Contract Options: Details

Each contract has a collection of options which will restrict an employee's working hours, allocate them holiday and change the reports that can be seen.

#### 4.11.1.1. Contract Details

- **Contract Title**
  The name of the contract.
- **Contract Type**
  This groups different types of contract together and can change the language used about a contract, so freelancers sign an agreement, volunteers sign terms & conditions and employees sign an employment contract.

#### 4.11.1.2. Contract Documents

- **Contract Document**
  This feature enables online signing of employment contracts. You will need to create a Contract Document to be used for the contract and this can be a copy and paste from Word. Once created, you can use the same Contract Document on multiple contracts.
  This will force staff to sign a digital copy of the contract document if they've not yet signed one or the previous document has expired.
-

#### 4.11.1.3. Contract Hours

- **Period**
  The length of time over which the following hour limits should be applied.
- **Start Date**
  This is when the period starts. The system will automatically calculate periods before and after this date. It's designed to roll each year.

- **Expected Minimum Hours**
  For permanent & contracted staff, this will be the number of hours you expect them to complete each contracted period. The TOIL settings then allow reporting on rolled hours month to month.
  For casual staff this is purely advisory and allows a report to be shown on how many hours each employee has completed this period.
- **Expected Minimum Hours: Exclude Dates**
  This allows you to tell the system not to apply the expected minimum hours for these staff members during the dates listed in the Exception Dates. It's perfect for staff who only work hours during specific terms or periods.
- **Swapping Shifts**
  This setting instructs the system on what to do if the staff member tries to reduce their hours below their contracted minimum expected hours.

### 4.11.1.4. Contract Options: Breaks, Rests & Limits

- **Schedule Limit: Maximum Hours**
  This limit is used by the intelligent schedule creation tool when assigning shifts. It will never assign more hours than this setting within a given contract period. Staff can still be manually assigned or take additional shifts above these hours.
- **General Limit: Maximum Hours**
  This hard limit is designed to prevent staff working too many hours in a given time period. Exactly what happens once the limit is reached is controlled by the Overage Rule.
- **General Limit: Overage Rule**
  This setting decides what should be done once the employee reaches the max hours per period.
  - **Never allow staff to be scheduled or paid in excess of these hours**
    Use this option for staff who have legal limits on hours they can work (Tier 2 and Tier 4 visas for example). They will never be allowed to be scheduled for more than the max hours and wage sheets will be blocked if the hours are exceeded until the issue is resolved.
  - **Allow additional hours and either pay staff or allow TOIL**
    This means the max hours will be used for advisory reports only.
  - **In general, do not allow staff to be assigned additional hours but allow managers to override via assign shift only**
    This will prevent the hours being breached by additional shifts or covershifts. Managers can override this by assigning a shift via the shift grid only. All other ways of assigning a shift or extending hours on a shift will be blocked.
  - **Never allow staff to be assigned additional hours but pay or allow TOIL for any overtime as normal**
    This will prevent a staff member from being assigned any additional hours but if they are clocked in for longer then this will not block a wage sheet and will allow the payment.
- **General Limits: Exclude Dates**
  This allows you to tell the system not to apply the general limit hours for these staff members during the dates listed in the Exception Dates. It's perfect for staff who are allowed to work longer hours outside of term dates or particular periods.

- **Enforced Rest**
  These settings will enforce a break between shifts once they reach a certain length. If a shift is X hours long then it will not allow a shift before or after this shift for the number of hours specified.
- **Overnight Enforced Rest**
  This enforces the specified period if the shift passes over midnight; it means that rest periods can be enforced for short shifts if they are worked late at night.
- **Breaks**
  Here you can select the break policy you want to use when the staff member is working under this contract.
- **Additional Restrictions**
  Here you can choose which contract restrictions should be enforced on this contract. You can create your own contract restrictions under Pay > Contracts > Restriction Rules.

### 4.11.2. Contract Options : Holiday

- **Earning Holiday**
  How should staff earn holiday hours within this contract?
  This can be fixed entitlements, pay as they earn, earn and claim and more.
- **Holiday Entitlement**
  These settings will only appear for permanent or contracted staff. For casual staff, you can set up automatic holiday payments in pay elements.
  The entitlement is a starting point for holiday allowances over the course of the business year. The year start date can be set under System > Configuration > Global Settings. See holiday for more information on how holidays work in StaffSavvy.
- **National / Organisation Holidays**
  These options determine if the various types of national holidays are deducted from their holiday entitlement or not.
  There are also options to auto-book in the days for these holidays. This will automatically add the holiday requests for the staff on this contract and deduct them from their entitlement (if that's the option above)
- **Length Of Service Additional Entitlements**
  This option increases holiday options in correlation with the length of service a Staff Member has given.
- **Rolling Allowance**
  These options determine if any unused/owed allowances can be rolled into the following year. You can also set a limit of how much can be rolled.
  Managers will still be able to review and approve the rolling of hours but these settings mean they will automatically be capped to save time.
- **Warnings and Request Blocking**
  These options allow the exclusion of certain dates as options to be booked off for Holidays. Alternatively, you can choose to set up a warning message if certain dates are requested.

### 4.11.3. Contract Options: Time Off / Time Owed In Lieu Settings

- **TOIL Mode**
  Allows you to enable/disable TOIL tracking
  - **Automatic TOIL Calculation**
    This is an automated management process for flexitime/TOIL. Using expected hours and actual recorded time, the system will report on how a staff member is doing against their expected hours.
    This can be seen at a glance on their profile and dashboard or managers will see a notification for all their staff who are under/over hours on their dashboard.
    This is the easiest process but requires staff to report all their hours.
  - **Manual TOIL Requests**
    This process allows staff to make requests for TOIL hours to be added to their account. Managers receive notifications and approve/reject these requests.
    Staff can then view their approved hours and claim against their TOIL hours with managers approving these claims in the same way.
    It allows a manual but managed process to track TOIL or flexitime within the system
- **Enabled When**
  This decides when we start counting TOIL based on how many hours over the expected hours the staff member has performed. **Roll time owned in blocks of**
  This allows you to only roll hours in specific lengths.
- **Limit on Rolled Hours**
  This allows you to limit how many hours can be rolled from a given period. This prevents too many hours being rolled forward or back.

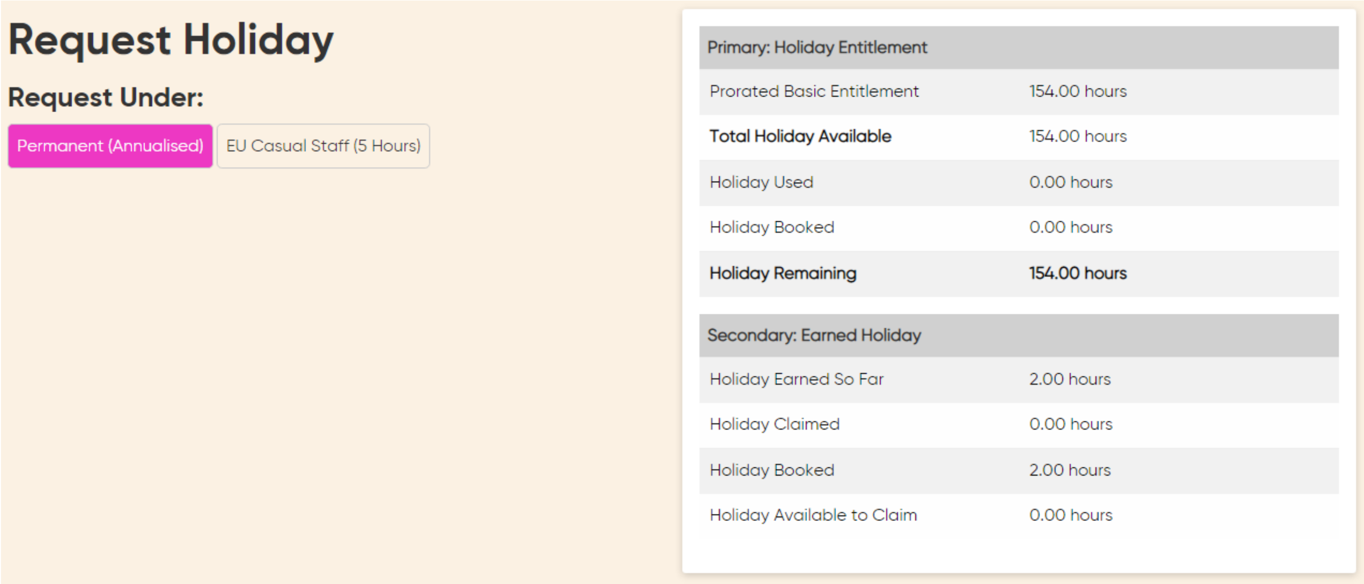
### 4.11.4. Multiple Contracts Holiday/Vacation

The system handles multiple holiday/vacation entitlements to be tracked and claimed based on the staff member's multiple contracts. This means that staff can earn additional holiday under a secondary contract and claim these hours or days when requesting holiday/vacations.

Profile pages will display each holiday entitlement for each of their contracts.

When requesting time off, the system will display all of the valid entitlements and allow the staff member to choose which entitlements to put the request against.




Each of the entitlements will contain a full breakdown and have the normal holiday report to be able to report and carefully manage the holiday entitlement usage.

### 4.11.5. Absences

- **Policy Set**
  The absence policy determines any pay entitlements for absences such as sickness. You can have different absence policies for different staff and choose the correct absence policy to be in place for each contract.
- **Absence Policy Eligible Days**
  This allows you to set which days the policy can apply. For staff who work certain days, this should be marked as just those days.
  For staff who work shifts that change week to week, the policy can be set to use their scheduled shifts and the eligible days should all be selected on this screen.

### 4.11.6. Shifts & Time Entries

- **Allow Shifts From**
  This allows a contract to restrict where the staff member can receive shifts. For example, they might be 'bank' staff that can only be manually assigned shifts by managers rather than being included in schedules by default.
- **Minimum Shift Length**
  This is the minimum length of shift you can assign to someone on this contract.
- **Maximum Shift Length**
  This is the maximum length of shift you can assign to someone on this contract.
- **Minimum Paid Shift Length**
  This will ensure all time entries are paid as though the staff member has worked at least this amount of

time. Shift budgets, contracted hours and staffing costs will use this minimum length. Staff will be paid as though they have worked this amount of time even if they were clocked in for much less.
It will not affect working restrictions so staff can be paid the minimum amount for showing up to a short shift and then return to work later in the day.
*Note*: Changing this setting will cause shifts and unapproved time entries to be re-calculated.

- **Time Entry confirmation**
  By default, managers need to approve each time entry before it will go into a wage sheet.
  This option enables an additional stop where staff must confirm their approved time entries before they will be processed. So managers still approve the time entries but then staff receive a notification here they can accept or question each approved time entry. Only confirmed time entries will be processed into a wage sheet.
- **Budgets**
  This option allows you to choose how the system budgets for staff on this contract. It allows you to provide different budget figures so that managers using the budget system cannot see their actual salary or rate of pay.
    - **Expected/accurate times**
      The system will use their expected rate of pay to calculate budgets
    - **Fixed cost per hour**
      The system will ignore their expected rate of pay and simply use this hourly rate in all cases
    - **Fixed budget per half day**
      The system will round any shift up to the nearest ½ day based on the hours in a day set on the previous pages. This is then budgeted at the figure provided.
      Note: working just a few mins over the boundary into two half days will be budgeted as a full day.
    - **Fixed budget per full day**
      The system will round any shift up to the nearest full day based on the hours in a day set on the previous pages. This is then budgeted at the figure provided.
      Note: working just a few minutes will still be budgeted as a full day
- **Pay Elements per Roles**
  This option locks the staff member's pay elements for all of the roles covered by this contract to use their default role rate. Alternatively, you can allow each role to have a different rate of pay.
- **Override Pay Element**
  If you have contracted or permanent staff who are paid a fixed salary for their hours and are paid separately for any additional hours then use this setting. When enabled, all hours below the maximum contracted hours in a given month will be set to the chosen pay element. The pay element should be set to be 0 per hour.
  Once the employee has worked their maximum number of hours then any additional hours in the month will be paid as per the normal rates on the skills/roles for that employee.

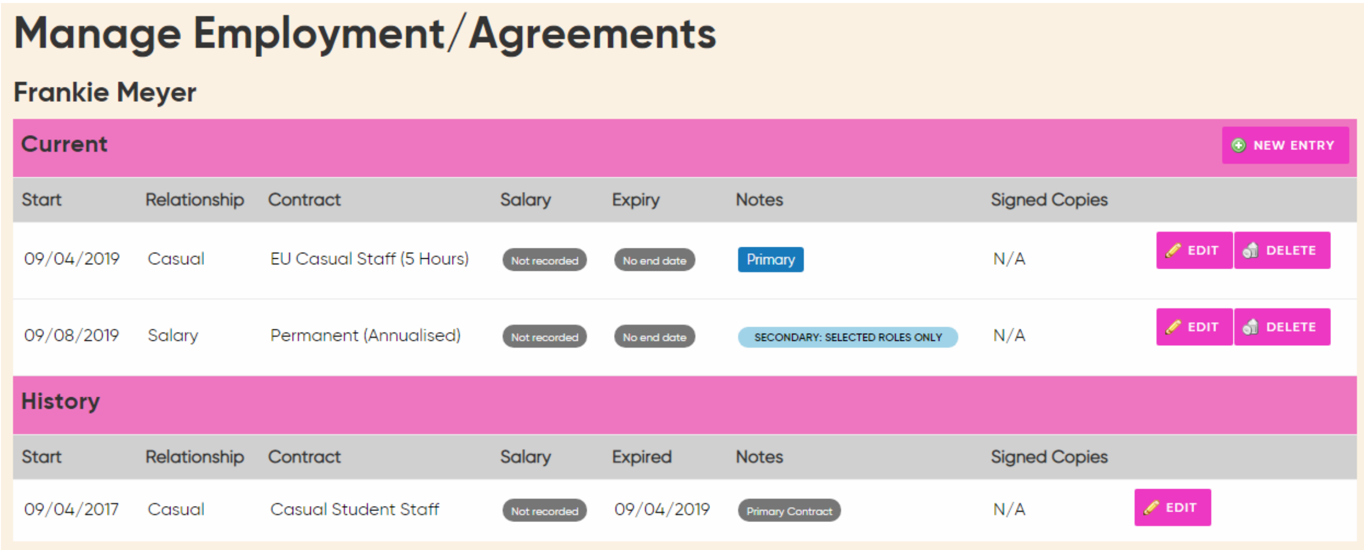
 

### 4.11.7. Assigning a Contract

You can assign a contract when an employee registers for the site, within their profile under Relationship Settings > Edit Details or via the Assign Contracts report.  The date that the contract is assigned becomes the contract start date.

Detailed contract management is available via their profile. Under the actions menu, choose Edit Details > Manage Contracts.

From here, you are able to edit start and end dates for the contract, which roles it should cover and view past contracts.



Manage Employment/Agreements

Frankie Meyer

Current — NEW ENTRY

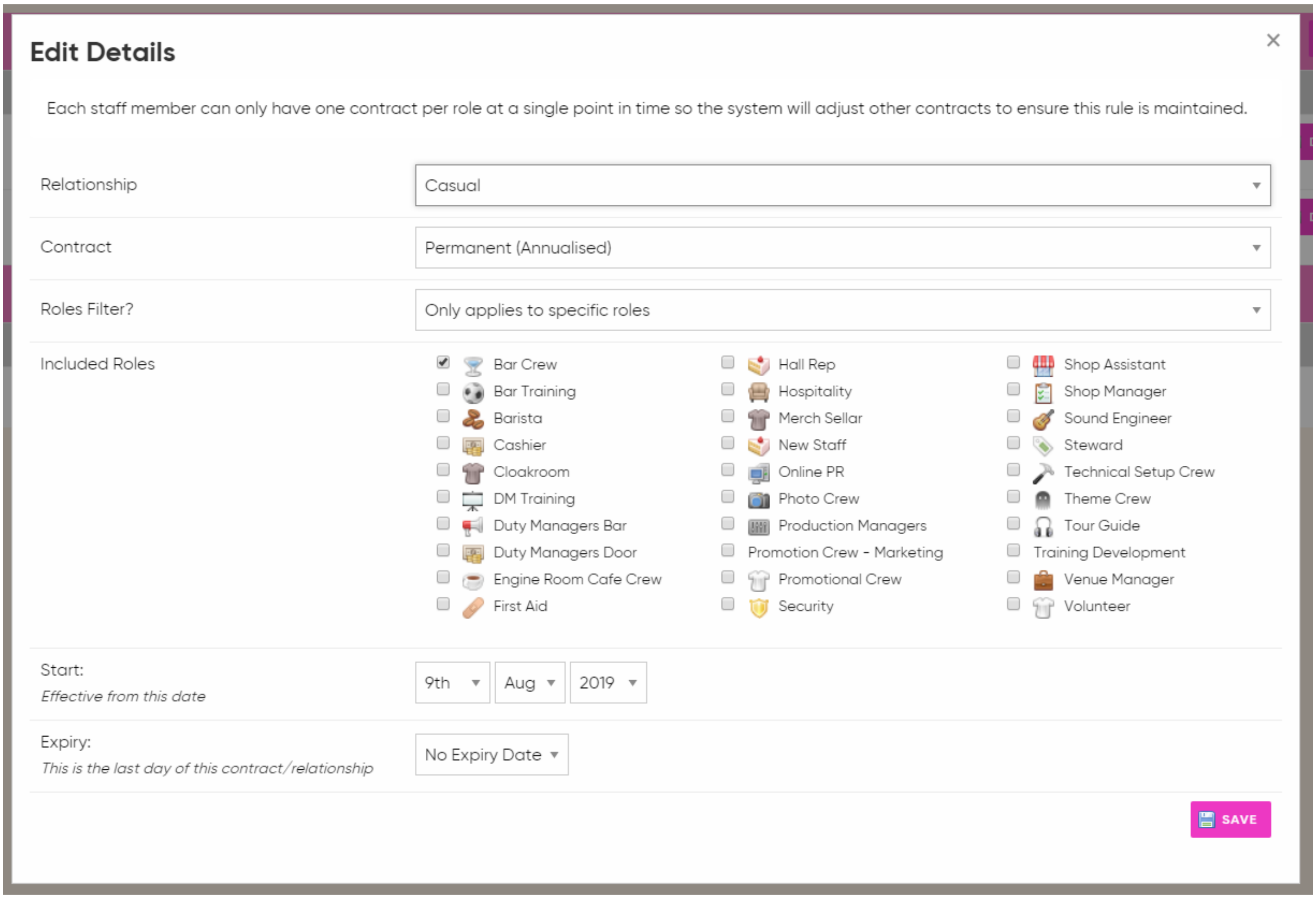
| Start | Relationship | Contract | Salary | Expiry | Notes | Signed Copies | |
|---|---|---|---|---|---|---|---|
| 09/04/2019 | Casual | EU Casual Staff (5 Hours) | Not recorded | No end date | Primary | N/A | EDIT DELETE |
| 09/08/2019 | Salary | Permanent (Annualised) | Not recorded | No end date | SECONDARY: SELECTED ROLES ONLY | N/A | EDIT DELETE |

History

| Start | Relationship | Contract | Salary | Expired | Notes | Signed Copies | |
|---|---|---|---|---|---|---|---|
| 09/04/2017 | Casual | Casual Student Staff | Not recorded | 09/04/2019 | Primary Contract | N/A | EDIT |

You can set the system to block staff working without an active contract under the Staff Settings section of Configuration in 'Manage Global Settings'.




If the contract type is enabled for a salaried staff, a salary box will be displayed to allow this information to be entered.

## 4.11.7.1. Uploading / Overriding Contract Documents

Under each contract within the ‘manage contract’ entries, you can manage the paperwork associated with the contract. This allows you to upload a pre-signed contract (e.g. a scan of a paper copy) or disable digital signatures completely.

You also have the option to assign a contract document that has previously been uploaded to it that is associated with that contract entry.

### 4.11.7.1.1. Contract Document Approval

By default, contract documents do not need approval. This allows for rapid assigning of documents. You can enable an approval process for contract documents within the Global Settings under Configuration.

There are two options: general approval and third-party approval. The general approval means someone with permission to edit contracts must approve a contract before it can be signed. This allows the contract document to be reviewed with the staff members details (and using the edit option detailed below, adjusted) before the staff member can see the document.

The third-party approval option extends the requirement so the approval must be made by a different manager to the one who assigned the document. For example Jane assigns a contract to Alice. Jack must now approve the contract document; Jane cannot approve the contract themselves. This provides a third-party check of the contract document.

#### 4.11.7.1.2. Contract Document Customisation

If you have a contract document assigned to the contract, you'll be able to preview the contract as the staff member will see it. On this preview, you also have the option to customise the contract to edit any of the content. Once saved, this document will be presented to the staff member to sign.

This option, combined with the approval process for contract documents allows you to review and adjust contract documents before the staff member is able to view them.

### 4.11.8. Contract Hours Reports

These reports allow you to see each employee within each contract and the hours they are performing against their min and max hours for any contract period. You can find this under Pay > Contracts > Contract Hours Report.

You can use the previous and next period buttons to jump between contract periods.

You can also view a detailed breakdown of the hours worked  per employee. This report will be different depending on if the employee is allowed TOIL or not.

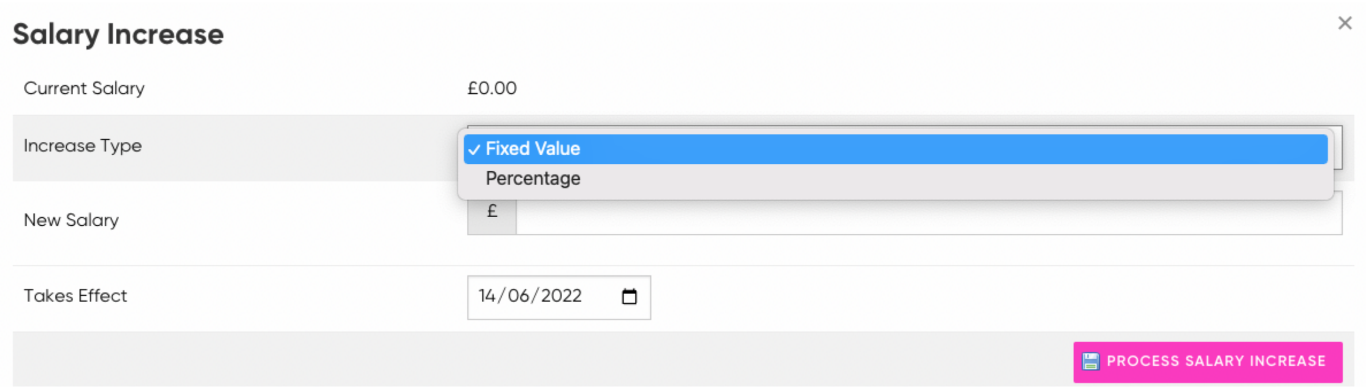
The TOIL report will include information on previous periods and a suggested action at the bottom if the employee owes or is owed hours. The non-TOIL version will simply report the hours compared to the employee's maximum hours in this contract period.

Staff who are assigned to multiple concurrent contracts will appear in multiple reports.

### 4.11.9. Quick 'Increase Salary' option

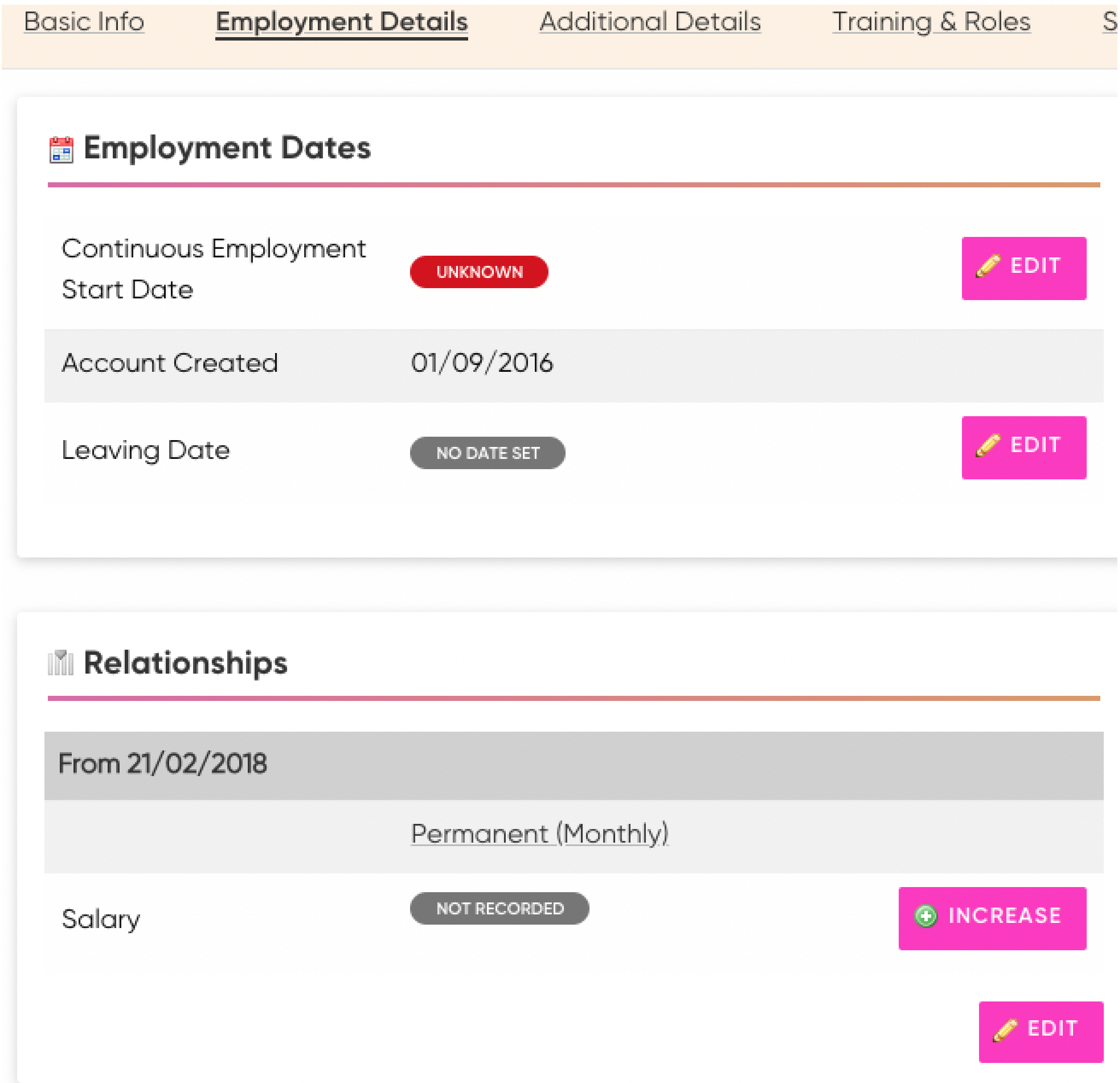
The update now allows you to quickly increase a staff member's salary by simply going to profile pages and Manage Contracts.




You can find this under Profile > Employment Details > Relationships. There you will be allowed to schedule a fixed change in salary or a percentage increase.




This can only be viewed and altered on a staff member with a salaried contract and does not apply to casual staff or freelancers.

# 4.12. Contract Date Sets

Date sets allow you to set date ranges when certain rules, expected hours or limits do not apply. This can be found under Pay > Contracts > Date Sets. It is particularly useful for the education sector, festival organisers or any organisation who have very busy or very quiet periods which affect the working rules.
You can create multiple Date Sets within the system for use by different contracts. These can each then have multiple date ranges contained within them.

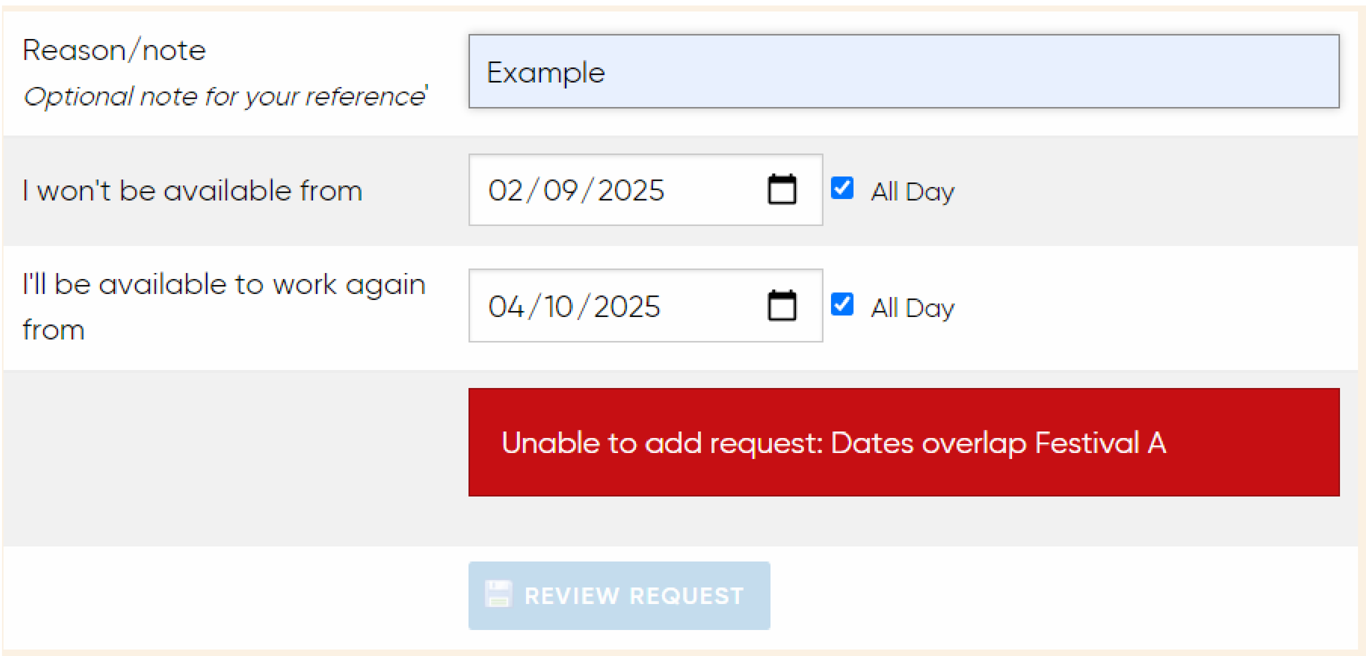
For a university example, you might have a set of dates called “Out of term/semester”. This set would list all of the holiday/vacation dates within the university and could be used to remove working visa limits or change the expected weekly hours for affected staff.

You can continuously add dates to each Exception Date set so these can be kept up to date without having to edit every rule or contract that makes use of them.

## 4.12.1. Automatically block holiday/time off requests during certain periods

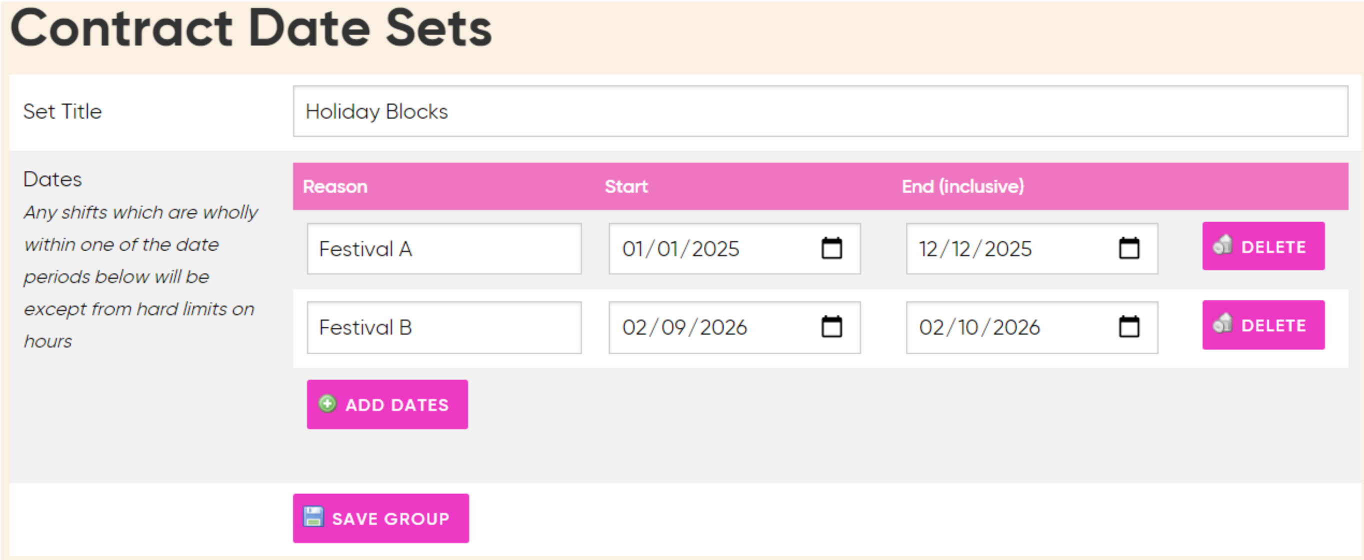
This option allows you to display warning messages to staff when they are requesting holiday or time off that cover certain periods of time.

You can also use the same option to block all requests during the dates provided. This is the ultimate option and no requests will be permitted during these dates.



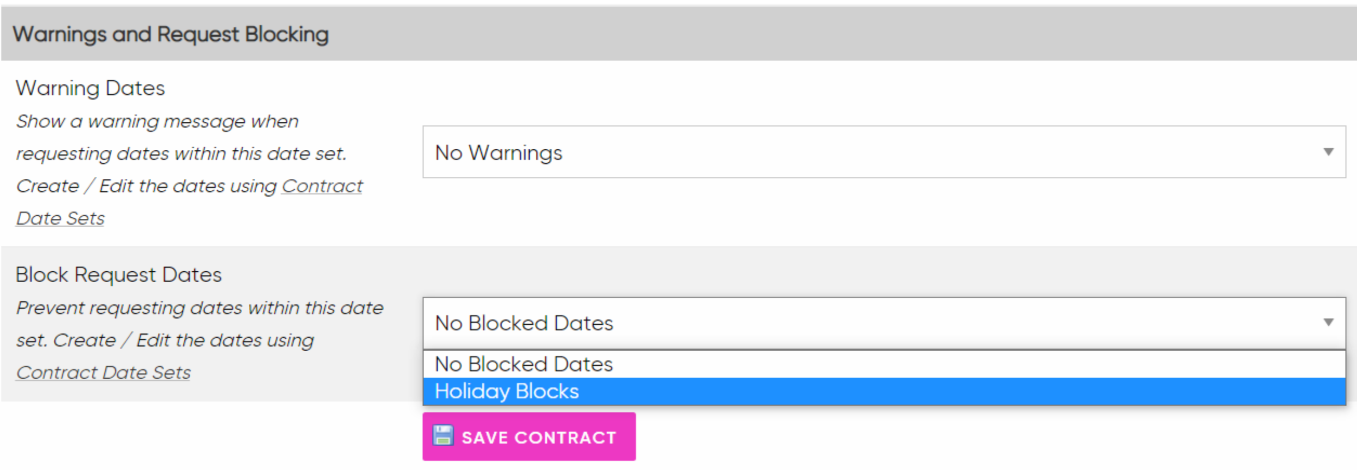

To set up a date set (which can be used to either block or display warnings) go to Pay > Contracts > Date Sets.

Create a new date set or update an existing set. Simply add all of the date ranges you wish to exclude. If it's a single date, then set the start and end dates the same.




Now, to assign the date sets to a contract. Go to Pay > Contracts > Manage Contracts. Edit your contract. Under the Holiday tab, find the Warnings and Request Blocking section.

You can choose different date sets for displaying warnings and blocking requests.




## 4.13. Contract Manipulation Rules

The contract manipulation rules are a very powerful set of rules that can be employed to update a staff member's paid or worked hours based on a range of filters.

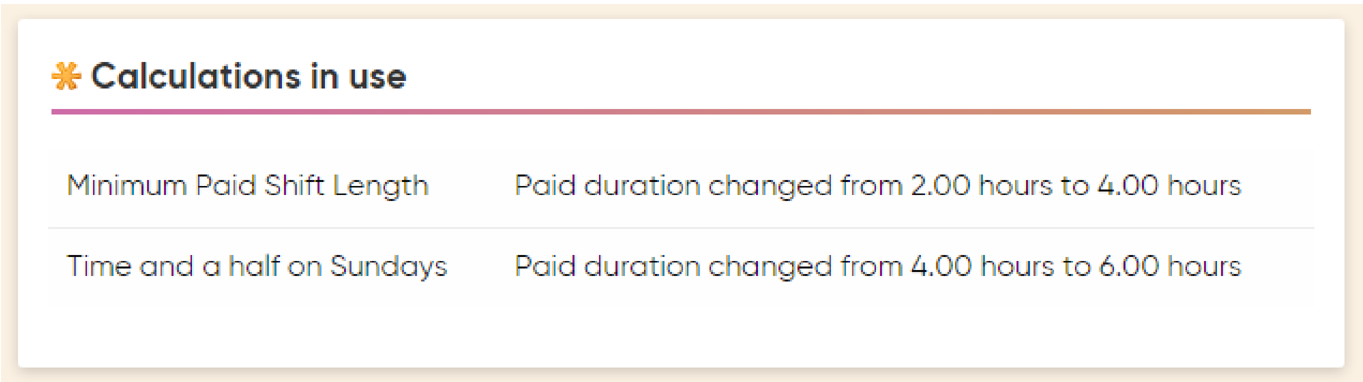
 

Create the rules under Pay > Contracts > Manipulation Rules. When editing or adding a new rule, you will be presented with a series of filters that you can use to tell StaffSavvy when to apply the rule. These can be between specific times, days, national or organisation holidays, when working so many days a week or when working over a number of hours.

Once the rule has been reached, you can tell the system to manipulate the paid hours and/or any hours deducted from the staff members contracted hours. For example, you can configure the rule to automatically pay double time on bank holidays; there are many, many possibilities.

The system will still maintain the actual hours worked and will use these for contract limits and rules; it is simply the hours paid that will be adjusted.

When a rule is in effect, a breakdown of the rules will be shown on both the shift details and the time entry details pages.



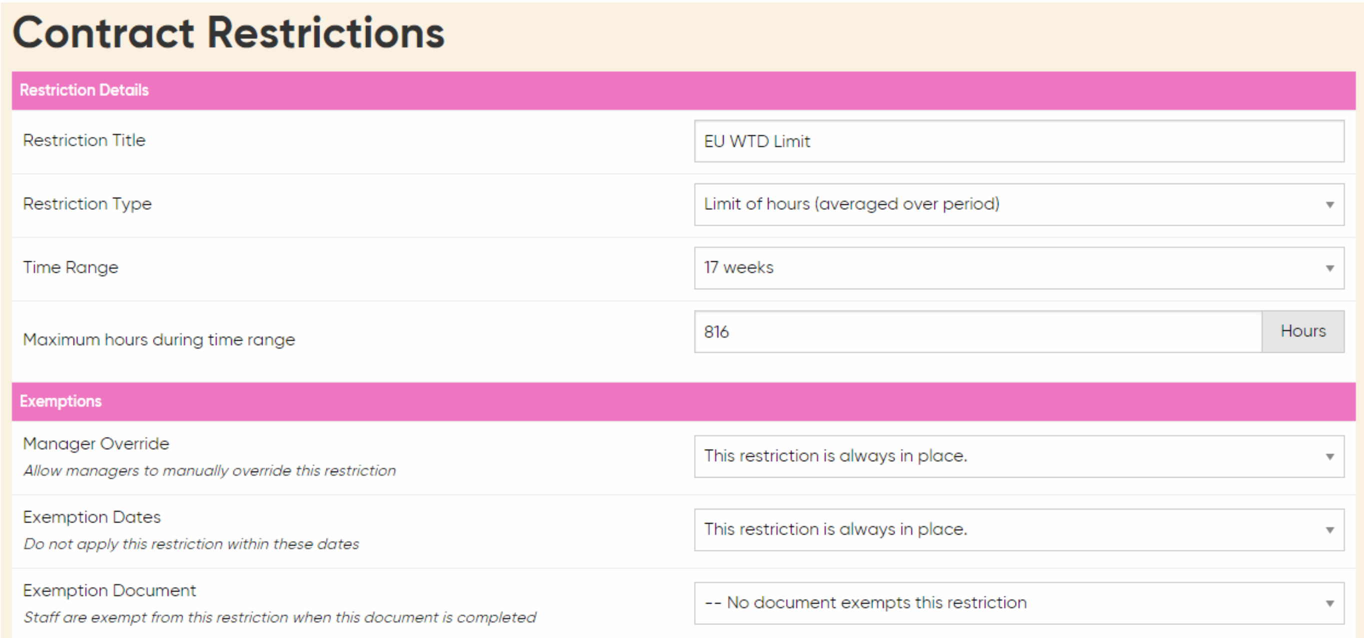

Shift budgets will take into account any of the contract rules too so that the predicted cost of a shift will be correct.

## 4.14. Contract Restrictions

Contract restrictions are a new way to provide restrictions to working practices on each contract. You can manage these under Pay > Contracts > Restriction Rules.

You can add as many restrictions as you wish and each can be assigned to any number of contracts.

In addition, you can allow staff to be opted-out of the restriction by completing a document. For example, in the screenshot below, the ‘Working Time Directive’ restriction will be applied automatically unless the staff member signs the WTD Opt-out document.




You can also configure the restrictions to be ignored during the exemption dates setup on the contract.

There are several types of restrictions:

- **Limit of hours (averaged over period)**
  This is a limit of a maximum number of hours over a set time range. The range can be between one day and a year. The system will add up all of the hours and will not allow a staff member to be scheduled in excess of these hours. The averaged option looks at a period each side of a shift and averages the hours. It's great for a general limit.

- **Limit of hours (strictly never any period over hours)**
  This is a limit of a maximum number of hours over a set time range. The range can be between one day and a year. The system will add up all of the hours and will not allow a staff member to be scheduled in excess of these hours.
  This is a stricter version which will look at the period of time immediately around the shift and ensure that the period where the shift falls in the middle of will not be over hours.

- **Limit of hours (Monday - Sunday)**
  This is a limit of a maximum number of hours over a set time range. The range can be between one day and a year. The system will add up all of the hours and will not allow a staff member to be scheduled in excess of these hours.
  This is a simpler version of the limit that looks at the week the shift falls within and applies the limit to the shifts within that week.

- **Maximum number of weekends worked**
  This is a limit of how many weekends are worked during the set time range. A working weekend includes any weekend where there is a shift on one or both of the days.

- **Required break duration**
  This restriction allows you to enforce a single break period of a number of hours during the set time range. For example, you can enforce an 11 hour rest within every 24 hours. You can also enforce 48 hours rest every 10 days.

- **Limit of Similar Shifts**
  This restriction allows you to enforce a rest period after the staff member has completed X shifts in a row between certain times. It's perfect to prevent a staff member being scheduled for a 5th night in a row and will ensure they receive a full rest period before working again.

## 4.15. TOIL (Time Off In Lieu)

StaffSavvy has three options for TOIL reporting; automatic, manual and a combination of both.

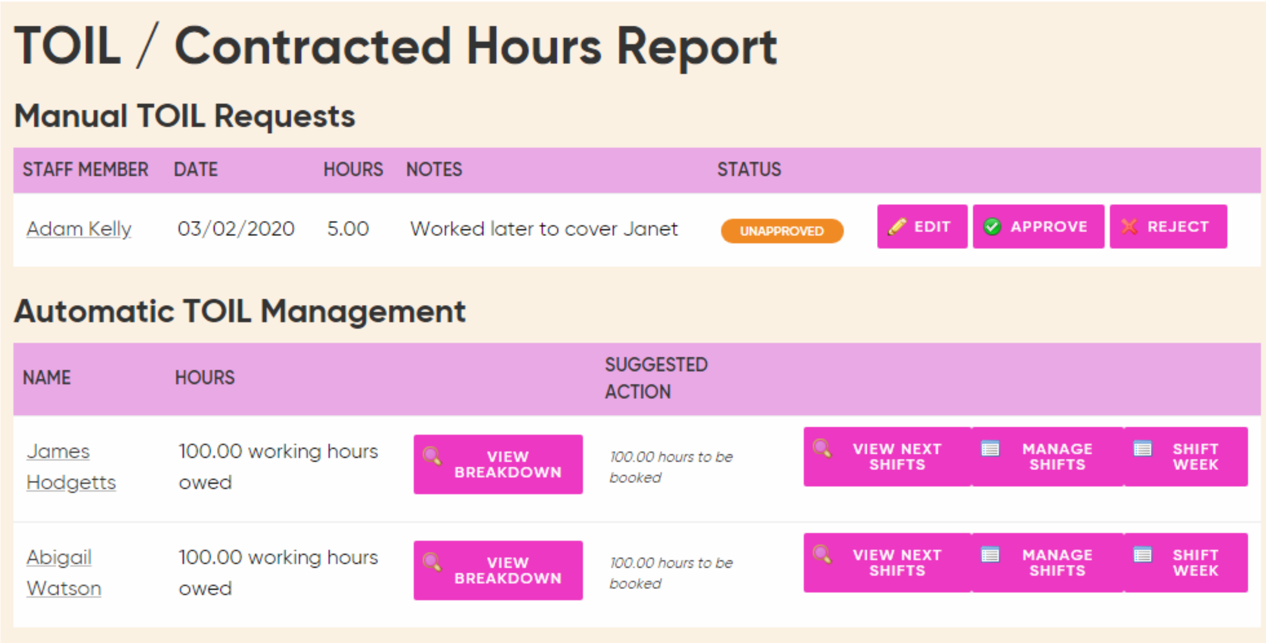
Automatic is the most common and is also used to allow hours to be rolled between months even if staff are not permitted to take a paid day off and are simply assigned less shifts.

TOIL is set up under each contract and you can choose how many hours can be rolled as well as the size chunks of time that can roll too. This can be edited under 'Manage contracts'.

Once configured, the system will automatically calculate hours owned based on rolling hours. This will be shown within the staff member's account and will be used whenever assigning hours.

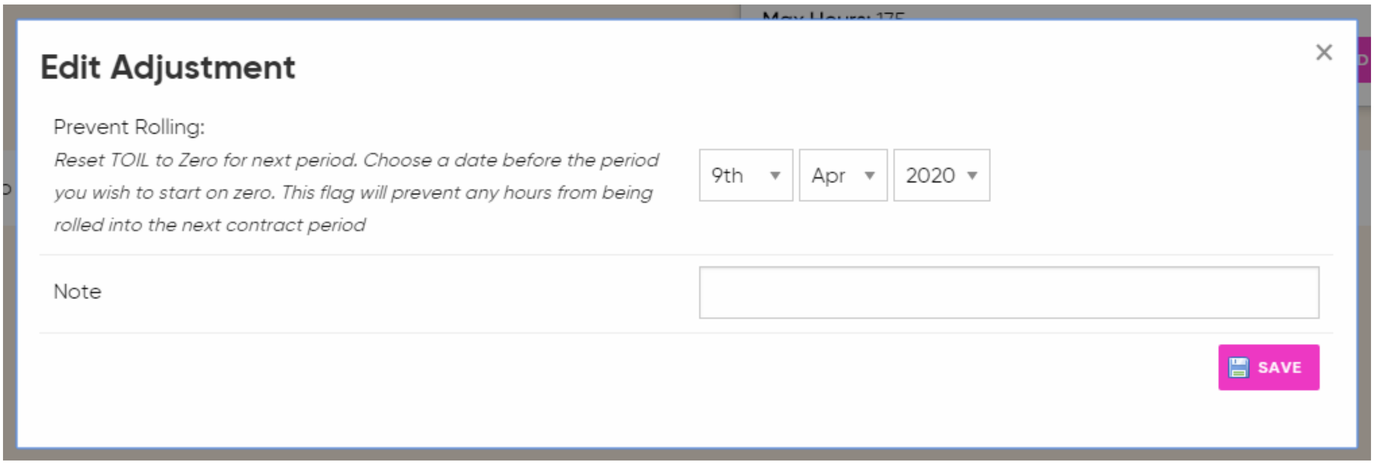
For the manual options, staff can make TOIL requests from their profile pages and they will be displayed to managers to approve on the TOIL Report.

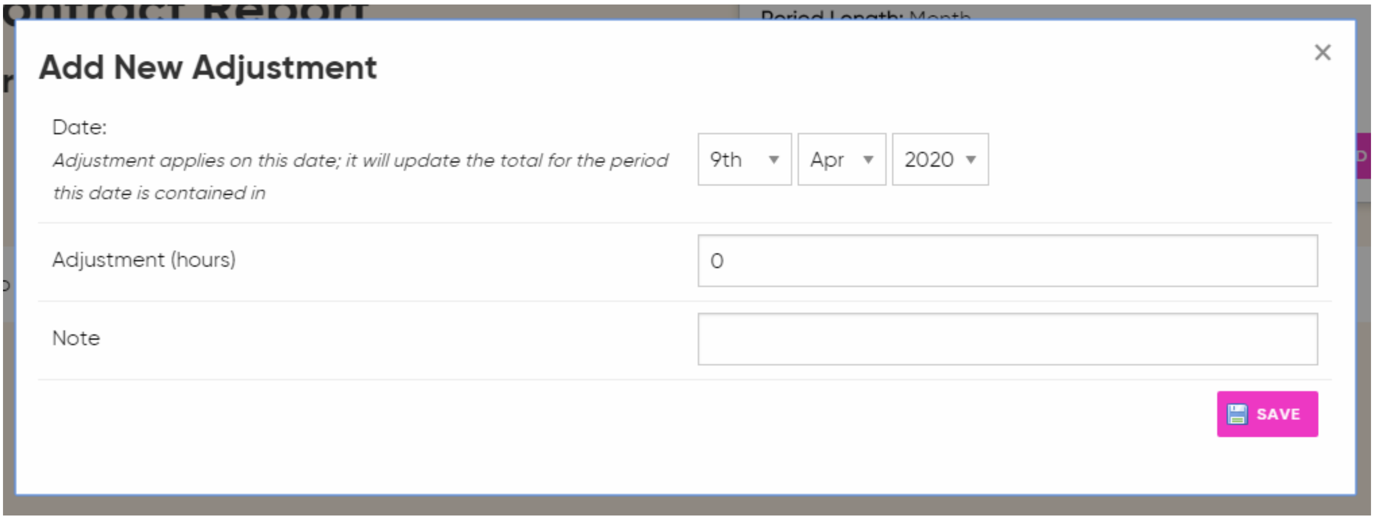



The system will automatically roll hours as per your settings forever. This can cause a problem if adding TOIL to an existing account as you often want to start TOIL reporting from a specific date. You might also want to reset TOIL at the start of each company year.

In both cases, you can use the Add Manual TOIL Adjustments option available under the Actions menu under Pay > Contracts > Contracted Hours Report to make changes to the TOIL hours. Here you can either add/subtract hours or you can tell the system to start the hours afresh in the next period. This means the staff member will show 0 rolled hours in the next period.





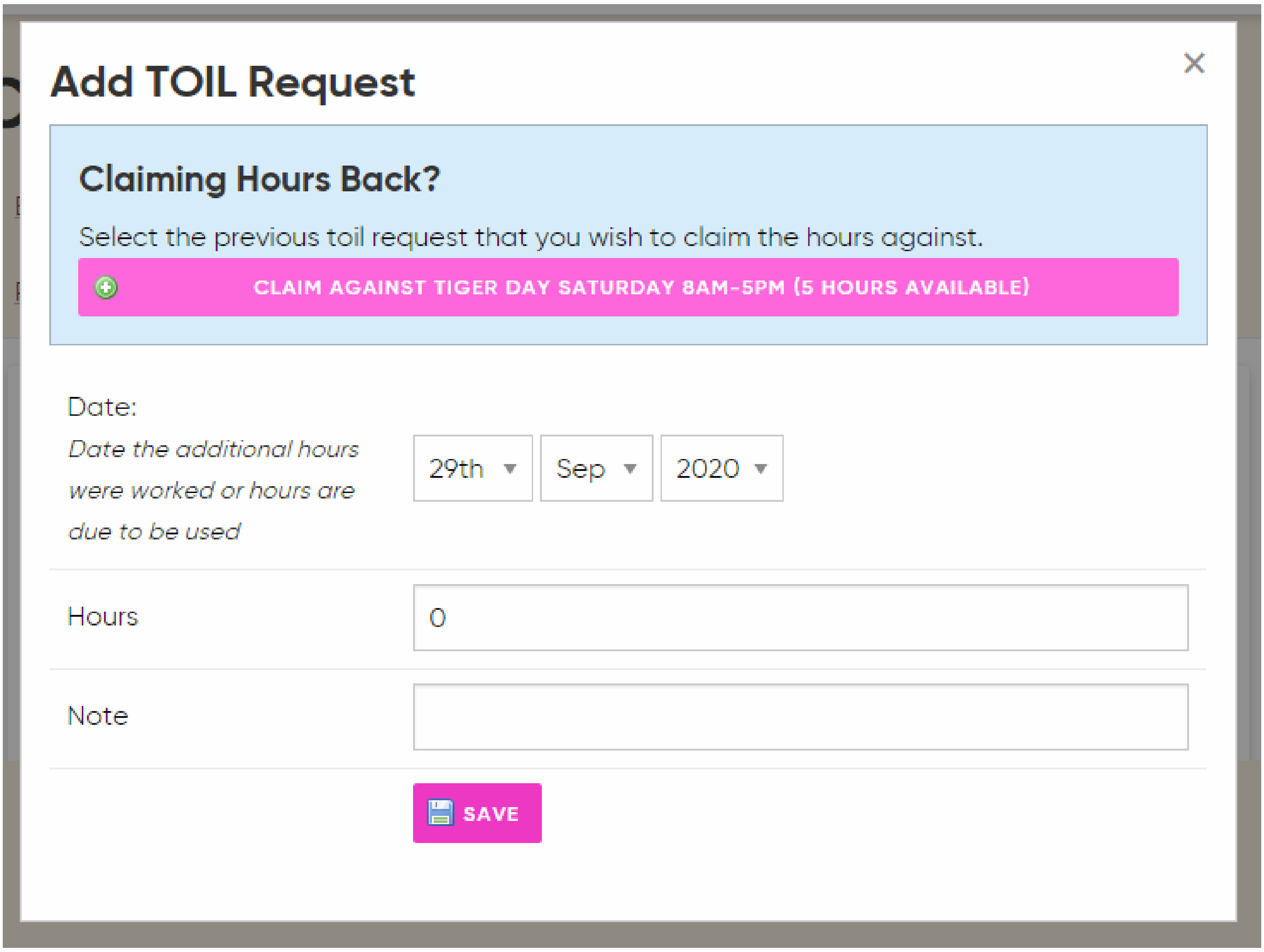

### 4.15.1. Claiming against TOIL hours

If you have hours approved in your account then you should claim any time off against those hours. This ensures that your claims are recorded against hours earned. It is particularly important if you have a time limit on when you can use the hours by.

If you don't make claims against the hours in your account then you can be in a situation when the hours owed to you have expired but the hours you have taken back are still valid and show your total as negative hours.

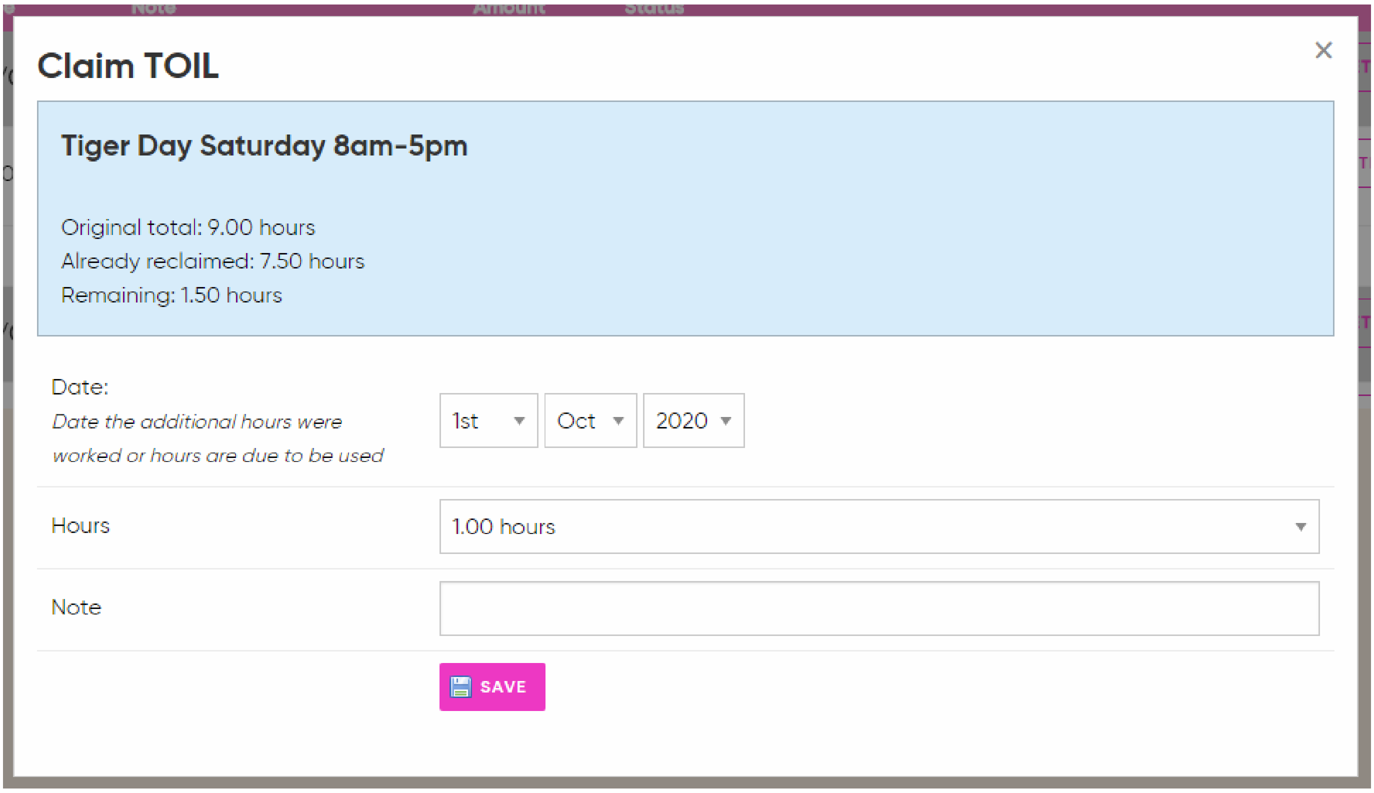
To claim against your TOIL balance, either go to your TOIL report; under your profile, use the actions menu at the top. Reports > Manual TOIL Report, on the report, simply use the Claim Against button. Or alternatively, you also add a claim against a TOIL balance from your profile page. Go to the Holiday & TOIL tab and click the Add new TOIL Request. In the box, you will see an option to claim hours back and to choose which of your balances to claim against:




Once you are claiming against hours, you will see a summary box at the top which shows you how much time you can claim back. You can only claim back up to the total hours in your original request. So if you requested 10 hours of TOIL then you can put multiple claims in for those hours until there are none left.

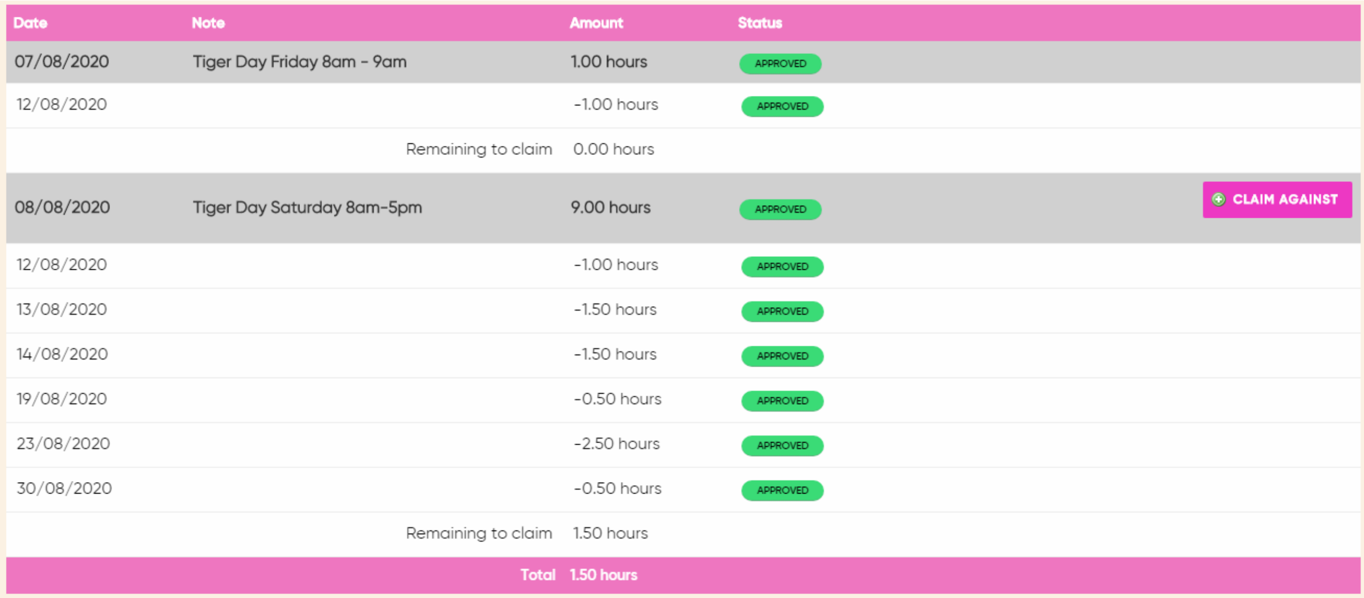
 




**Note: If you need to claim more hours than there is available under a single entry then you will need to make multiple claims for the same day. This will ensure your TOIL balances are correctly recorded and accounted for.**

Your TOIL request will go through the usual approval process but you will now receive a clearer summary of your TOIL balance and your usage:



| Date | Note | Amount | Status | |
|---|---|---|---|---|
| 07/08/2020 | Tiger Day Friday 8am - 9am | 1.00 hours | APPROVED | |
| 12/08/2020 | | -1.00 hours | APPROVED | |
| | Remaining to claim | 0.00 hours | | |
| 08/08/2020 | Tiger Day Saturday 8am-5pm | 9.00 hours | APPROVED | CLAIM AGAINST |
| 12/08/2020 | | -1.00 hours | APPROVED | |
| 13/08/2020 | | -1.50 hours | APPROVED | |
| 14/08/2020 | | -1.50 hours | APPROVED | |
| 19/08/2020 | | -0.50 hours | APPROVED | |
| 23/08/2020 | | -2.50 hours | APPROVED | |
| 30/08/2020 | | -0.50 hours | APPROVED | |
| | Remaining to claim | 1.50 hours | | |
| | Total | 1.50 hours | | |

### 4.15.2. Manager Options

A manager has additional options within the Manual TOIL Report. These options allow the manager to add additional entries to a claim even if it will reduce the total below zero.

They can also delete entries, edit them and connect/disconnect.

The connect/disconnect options allow for entries to be assigned to each other so they display in the groups shown on the report.

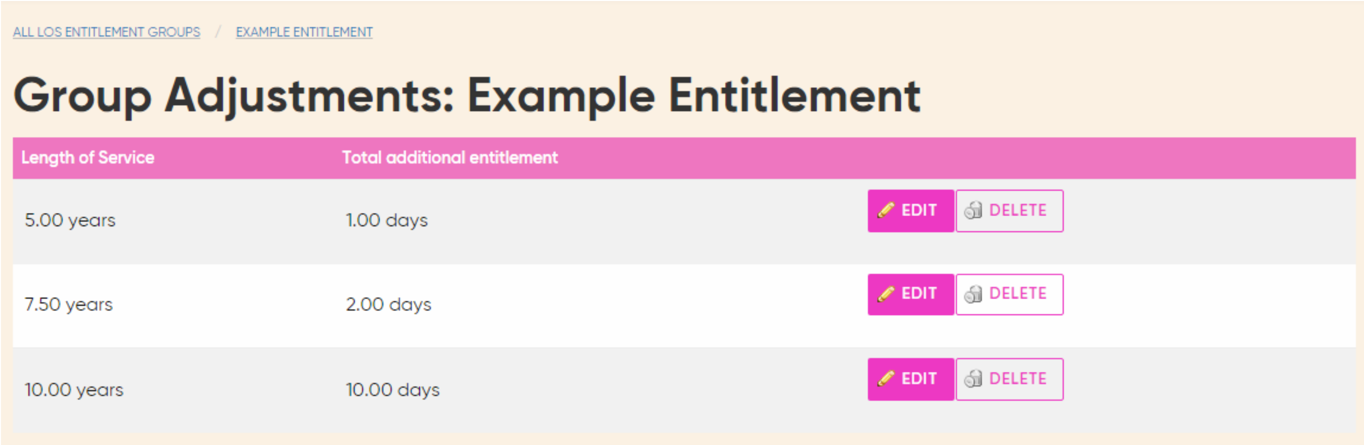
For example, in the image below, the 03/09/2020 entry is not connected to Tiger Day on 08/08/2020. Using the Connect option, a manager can assign that claim against the Tiger Day balance.

| Date | Note | Amount | Status | |
|---|---|---|---|---|
| 07/08/2020 | Tiger Day Friday 8am - 9am | 1.00 hours | APPROVED | ADD ENTRY AGAINST / EDIT / DELETE |
| 11/08/2020 | | -1.00 hours | APPROVED | EDIT / DISCONNECT / DELETE |
| | Remaining to claim | 0.00 hours | | |
| 08/08/2020 | Tiger Day Saturday 8am-5pm | 9.00 hours | APPROVED | CLAIM AGAINST / EDIT / DELETE |
| 12/08/2020 | | -1.00 hours | APPROVED | EDIT / DISCONNECT / DELETE |
| 13/08/2020 | | -1.50 hours | APPROVED | EDIT / DISCONNECT / DELETE |
| 14/08/2020 | | -1.50 hours | APPROVED | EDIT / DISCONNECT / DELETE |
| 19/08/2020 | | -0.50 hours | APPROVED | EDIT / DISCONNECT / DELETE |
| 21/08/2020 | | -1.00 hours | APPROVED | EDIT / DISCONNECT / DELETE |
| 30/08/2020 | | -0.50 hours | APPROVED | EDIT / DISCONNECT / DELETE |
| | Remaining to claim | 3.00 hours | | |
| 03/09/2020 | | -7.50 hours | APPROVED | ADD ENTRY AGAINST / EDIT / CONNECT / DELETE |
| | Remaining to claim | -7.50 hours | | |
| | Total | 1.50 hours | | |

# 4.16. Length of Service Holiday/Vacation




Length of service adjustments allow you to automatically grant additional hours or days of holiday/vacation entitlement to staff based on their length of service.

It will automatically adjust each year as the staff member's length of service increases.

The length of service adjustments are created using groups; this allows you to have multiple automatic length of service policies operating at the same time. Each contract can be assigned a different group if required.

To set this up, add a new Length of Service group under Pay > Contracts > LoS Holiday Entitlements. Once added, add a new entitlement by specifying the years of service required and the total to add to their entitlement. Note that the system will calculate their adjustment based on the length of service at the start of the holiday entitlement year.

Once you have all of the different entitlements added, you can assign this to a contract. Edit a contract and select the correct length of service entitlement group under the Holiday tab.

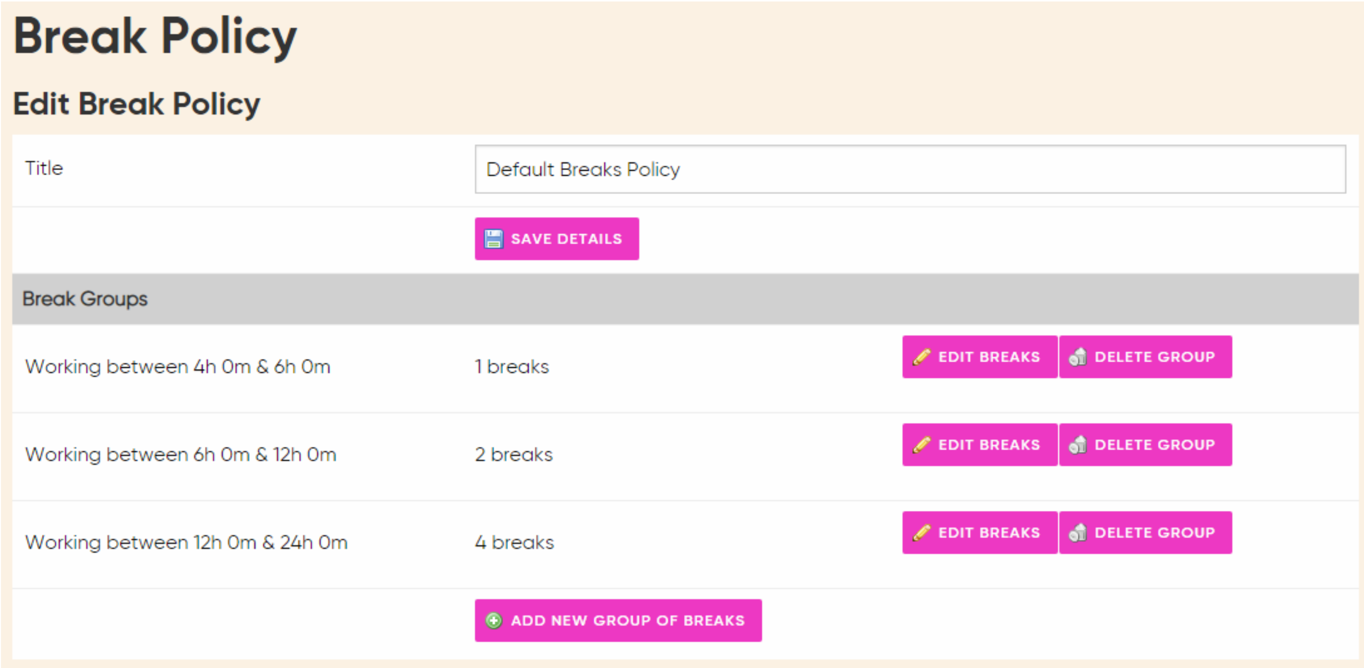
Note: this will be in addition to any manual adjustments you have added to a staff member's account. If you have Length of Service adjustments already then please discuss this with our support team who can help you migrate to this new feature.

# 4.17. Break Policies

You can configure a default break policy and add more break policies and to assign them to different contracts. This means staff can be entitled to different breaks depending on their contract (and with multiple contracts they can be using different break policies for different roles).

Access the break policy management under System > HR Settings > Break Policies. You will see your existing default policy that you can edit along with options to add a new policy.




Break policies are made up of groups; each group covers a length of shift. So if you want a break policy for any shifts over 6 hours, create a group with the shift lengths set to 6 hours and 1 minute (so over 6 hours) and choose a maximum length. This can be very long to cover all shifts lengths.).

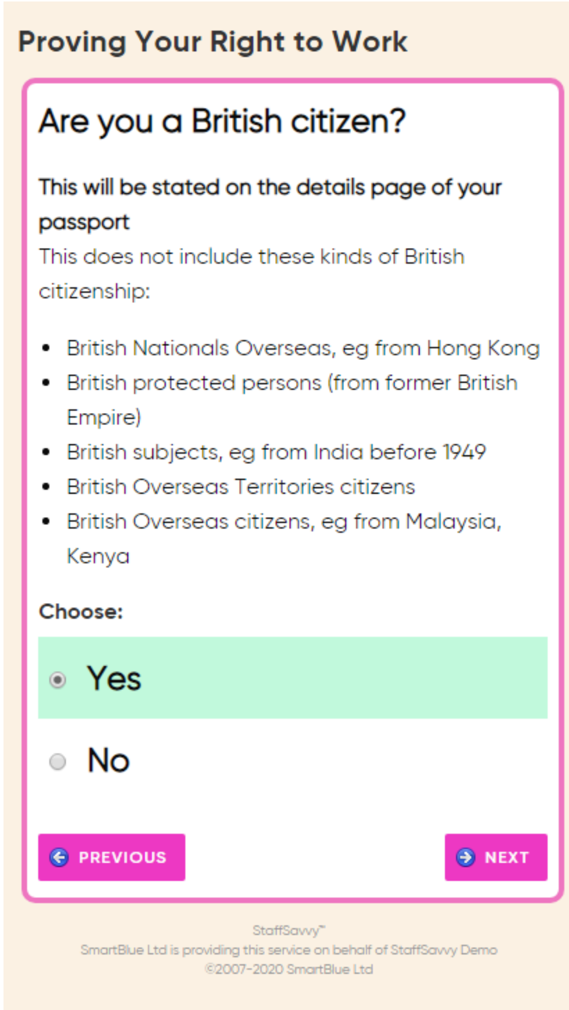
Note: to prevent any confusion, make sure your break groups do not overlap.

Once you have a group setup then you can add breaks to that group. Each break is just a duration and a note to say if it's paid or not.

You can then choose which break policy applies under each contract within the Breaks tab.

# 4.18. Dynamic Employment Eligibility Management

## 4.18.1. The process




1. New staff register on the site and are authorised by a manager. Alternatively, they can be invited or have their account created for them by a manager.
2. When they log in, they will be informed that they have not yet proven their right to work (UK) or employment eligibility (US) and they must prove this before they can work. Staff will not be able to take shifts or be assigned by managers at this stage.
3. Staff are asked to complete a questionnaire on what documents they can provide to you. This is taken from the Government online questionnaire and will aim to assign them to a classification. The classification simply stipulates the documents they have stated they can provide to prove their eligibility.
4. Once classified, the staff member is shown a list of the documents they need to provide and are informed where to take the documents.
5. If there are documents that the staff member can upload themselves (such as term times) then they are invited to do that via the site. The uploaded document will still need to be checked by a manager before being accepted.
6. The staff member will now need to take the physical documents to your stated location to be reviewed and copies taken.
7. The managers will now need to upload copies of the documents. This is completed via the Employment Eligibility Report, accessed either via the notifications on the dashboard or via the Staff menu option.
    a. Manager finds the staff member on the Employment Eligibility report and clicks Upload/verify documents. This can be found under Reports > Staff Reports > Work Eligibility Report.
    b. A list of the required documents will be listed and each one should be uploaded.
    c. When uploading each document, the staff member will be informed of the points to check on the document. They will be asked to enter an expiry date if this is present on the document.
    d. The manager will finally be asked to certify that they believe the document to be valid
8. Once all documents are uploaded and validated, the staff member will be informed that their documents are in order and they can now either work or complete further on-boarding steps.
9. If a document expires in the future, the staff member will be informed before expiry and will repeat steps 4 to 8.

### 4.18.2. Classification

The built-in questionnaire will automatically assign the staff members to the expected correct classification. This should not need manager interaction at all and has been built using plain English and using images of the documents where available.

Some staff might not be able to be classified using this questionnaire and they will be informed to speak to the HR team to work out how they can prove their employment eligibility.

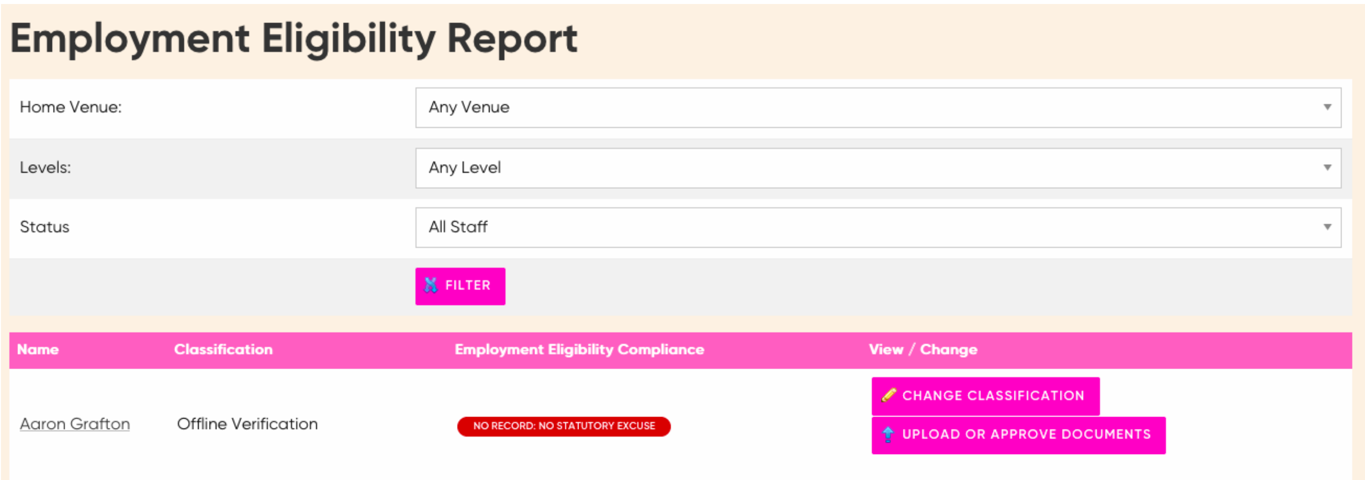
The classifications are provided by StaffSavvy with the system. If required, additional classifications can also be added. The custom classifications can only be assigned by a manager manually to each staff member using the Employment Eligibility report. A custom classification can require any number of document types. Each document type must be provided to confirm the staff member's  employment eligibility.

### 4.18.3. Uploading Documents

The Employment Eligibility Console is the easiest place to start when uploading documents. It allows a search for a staff member's name along with looking for staff without Employment Eligibility proof or that have proof expiring soon. This can also be accessed via a Staff member's profile under the Actions menu > Documents > Employment Eligibility.

To upload a document, click Upload/Verify Documents.

This report will show you the documents that this employee needs to provide.




### 4.18.3.1. Upload a Document

Simply click the upload document button. This will take you to a page where it will ask you to select the document to upload. On a mobile phone, you can select photos of the document to upload. You can upload any document type. If you are uploading multiple pages of the same document then simply select all of the images at the same time. StaffSavvy will combine these into one document when they are uploaded.

Review the notes about checking the document. The person uploading the document is ultimately responsible for confirming this staff member has employment eligibility.

### 4.18.3.2. Verify a Document

If the document can be uploaded by the staff member then it might need to be verified. In this case, the uploaded copy will just need to be verified by a manager to make sure that the document appears correct and the required information is provided.

Review the notes about checking the document. The person verifying the document is ultimately responsible for confirming this staff member has employment eligibility.

### 4.18.3.3. Expiring Documents

If a required document has been uploaded with an expiry date, both manager and staff will be informed before the document expires.

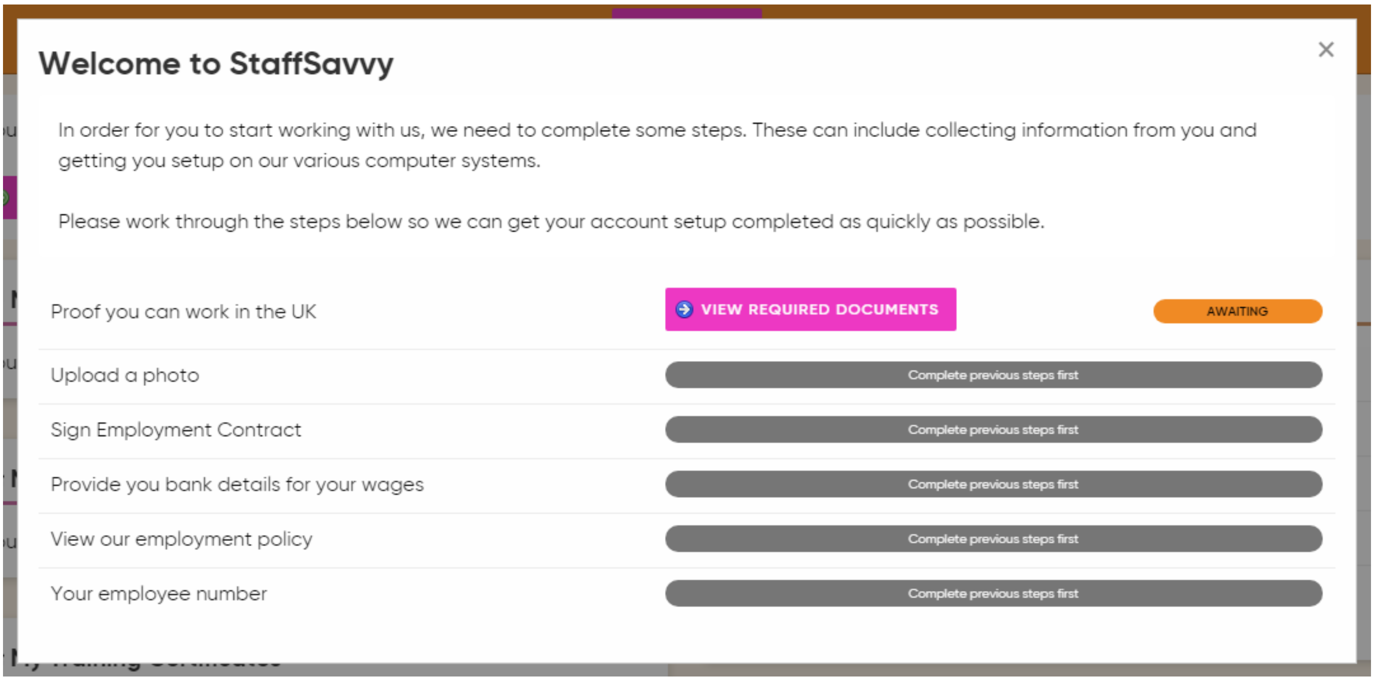
Managers will see the information on the dashboard notifications and staff will receive both an email warning and a large warning on their dashboard.

Staff will automatically be blocked from taking any shifts that go past the expiry date of the document.

New documents will need to be uploaded to continue; this process follows the same steps as a new staff member. Staff can also change their classification if their circumstances have changed.

# 4.19. On-Boarding Steps




## 4.19.1. Concept

Ensuring that a staff member is correctly setup with all relevant paperwork and forms completed is normally a challenge for large, high-turnover work forces. On-boarding Steps aims to make this easy and push the onus on completing the steps down to the staff members themselves.

Onboarding Steps are perfect for organisation-wide steps. You can use Role Requirements to add additional items that specific jobs require.

You can set the order the items need to be completed and require previous steps to be completed before continuing to the next group.

## 4.19.2. Creating the Steps

Steps can be added at any time. They will then only apply to staff who have not completed all of the steps so far. It is possible to require all staff to complete that additional step, using the option available via System > HR Settings > Manage On-Boarding Steps.

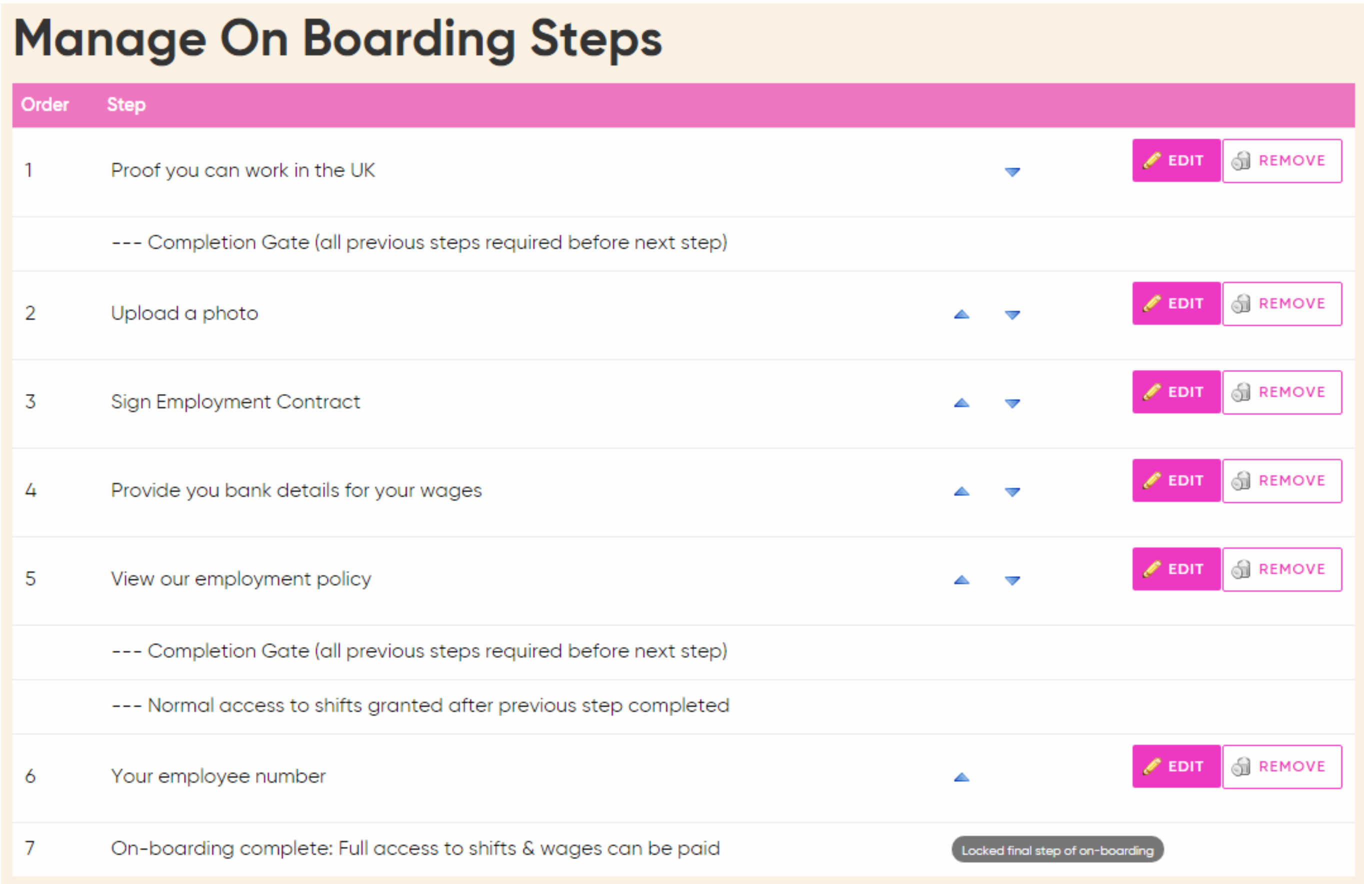
 

When creating a step, you will be asked to confirm the requirements needed for each step (details on these are listed below). Some steps require further information which will need to be displayed to you once you've chosen the type of step.

Completion Gates are an option you can enable on some or all steps when editing. This means that the staff member will not be asked to continue unless they have completed that step and all previous steps.

This allows you to group the steps into groups which need to be done together.

Once a step has been created, you can also edit it to get access to an additional step; you can enable limited or complete access to shifts once the step is completed. This allows you to put steps such as employee reference numbers or profile photos after the staff member has been granted access to take shifts.




### 4.19.2.1. Employment Eligibility Proven

This simple step will simply ensure the staff member has had all of their documents checked and copies uploaded to the site.

#### 4.19.2.2. Additional Document Required

This allows you to require any document or combination of documents to be provided above the normal Employment Eligibility proof. A common example is either the P45 or New Starter Form.

To require one of these documents, create a new Document Type (under the System > HR Settings > Manage Document Settings) that is called something like “P45 of New Starter Form”. In the description, you can provide information to your staff members about providing either their last P45 or to download, complete and upload the New Starter Form. You can provide a link to the form too. For either the P45 or New Starter Form, you do not need to see the original so you can allow staff to upload their own copies and simply require that they are checked.

Once the new document type is added, this will be listed under the document type drop down within the steps.

#### 4.19.2.3. Training Program or Training Certificate Completed

These two options allow you to require staff to complete a program of training or individual training stages as part of their on-boarding process. These might be online or physical courses. They can also be externally managed where staff upload their certificates back to StaffSavvy.

#### 4.19.2.4. Contract Signed

This requirement will ensure that staff assigned to a digital-signature contract must review and sign their contact at this stage.

#### 4.19.2.5. Field Set completed

This allows you to choose any of your field sets to ensure staff complete this information before they can be assigned shifts. Only fields marked required will be enforced.

#### 4.19.2.6. Employe Reference Provided

This step *

#### 4.19.2.7. Resource Library item viewed/downloaded

This step can force staff to view or download a particular page, document or link within the Resource Library. This is perfect to point staff at policy documents or additional information.

#### 4.19.2.8. Exam Successfully Completed

Exams allow you to test the knowledge of staff with an automatically marked exam. Exams can have any number of questions and a highly customisable marking scheme. This is a great step to check if staff have read previous policy or legal documents or have knowledge of licensing laws etc.

### 4.19.2.9. Profile Photo Uploaded

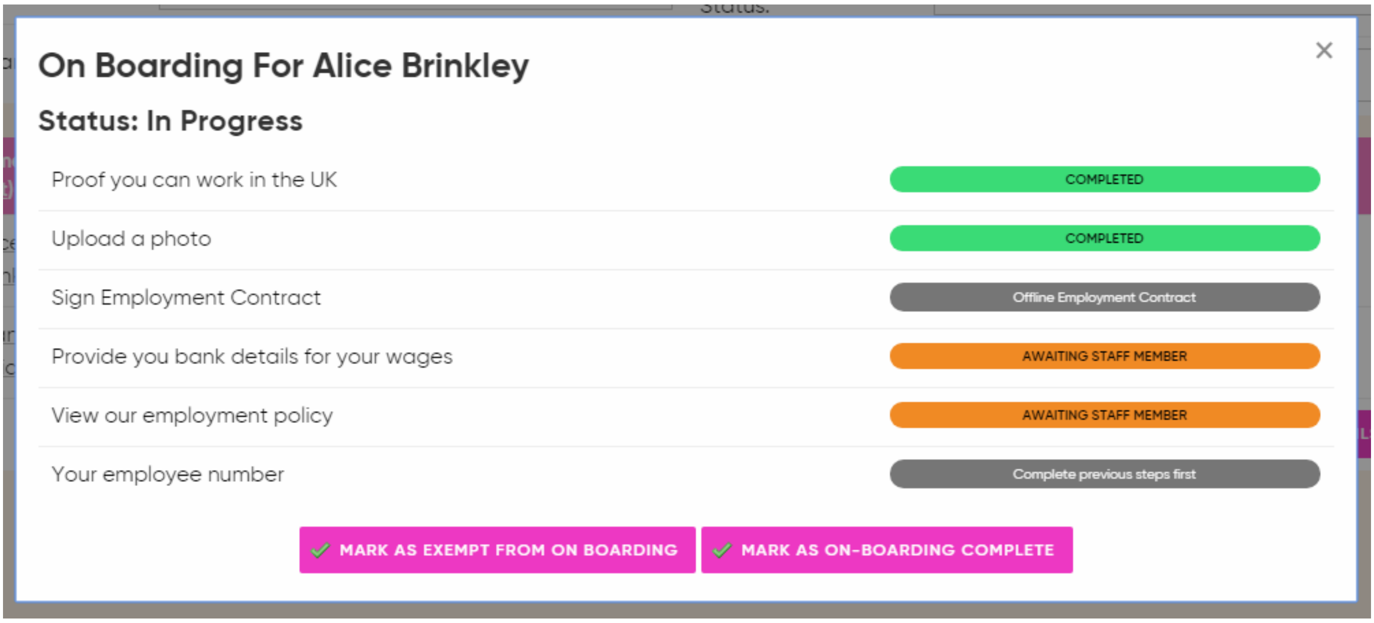
This step will require staff to upload a profile photo to their account.

## 4.19.3. View Employee Onboarding Status

The current status of an employee's onboarding progress is shown on Staff > Staff Settings > Manage Staff. It is displayed as a traffic light icon to the right of their name under the 'Manage' option.

- [Red] In Progress and no access to shifts
- [Yellow] In Progress but has access to one or more shifts
- [Green] Complete
- [Off] Exempt

Clicking on the icon will display a full breakdown of the employee's status.




The popup displayed all of the steps and which ones the employee has completed and which are in progress. Steps they do not yet need to complete will be marked as grey.

There are options on the popup to change the status. Either this will offer to set the status to Exempt or Complete, or it will offer to reset the on-boarding status so that the staff member must complete all steps. If they have already completed some steps then this will automatically be set as completed.

## 4.19.4. Avoiding / Completing Onboarding Steps

If you have an existing employee who does not need to complete the onboarding steps then you can "exempt" them from needing to complete the steps at all.

Use the Manage Staff page to search for the employee. Click on the traffic light to the right of their name under 'Manage'. This will show you their onboarding status. At the bottom is an option to mark them as exempt. This will disable the on-boarding steps for this employee.

You can also use this option to mark the on-boarding steps as complete. There is little difference between being exempt or marking their steps as complete. It can be used to separate existing employees and those who have completed all steps that apply to them.

# 4.20. Staff Documents & Document Types

Staff have full access to all documents that are uploaded by them or you to their account. These also include their Employment Eligibility documents.

You can request or allow staff to upload or digitally complete their own documents too. This is often connected to the onboarding process, role requirements or triggers.

## 4.20.1. Document Types

StaffSavvy manages the document store using Document Types. A document type specifies what the document is and rules around who can upload it, delete it and if it needs to be checked by a manager.

You can manage the document types under System > HR Settings > Manage Document Types.
There are currently three styles of document type; , or Signature Page appended to Library Item or Digitally Completed.

### 4.20.1.1. Upload Document Type

Upload document type means staff must upload a copy of the document or an image of the completed document. It's perfect for complex documents or copies of licences etc.

### 4.20.1.2. Append Signature Document Type

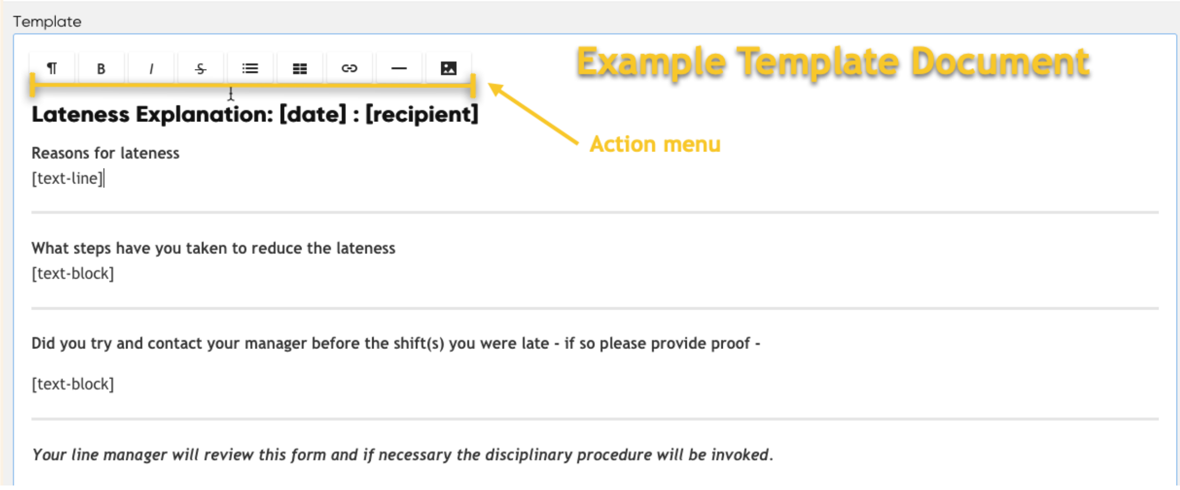
This allows you to display a library document and request a signature below the document to confirm the staff member has read and understood the document shown.

### 4.20.1.3. Digitally Completed Type

Digitally Completed means that staff are presented with a template of text and then are allowed to provide text in certain areas within the template. They then digitally sign the document to confirm their agreement and that the content is correct.

When using this document type, you need to provide the text for the document. You provide this within the 'Template' section when creating a new document. You can use a series of mail-merge fields to include information about the employee completing the document automatically.




There are four types of form fields available; single line (e.g. a small amount of text), text-block (a large, multi-paragraph amount of text), checkbox (e.g. check to confirm) or radio buttons (e.g. choose one from this list).

Radio buttons are slightly more complex to set up than the other fields. To allow them to work correctly, we need to know which radio buttons are part of the same group. This is the # within the [field-radiobutton-#] so add [field-radiobutton-1] multiple times to have multiple options that you must choose between. If you need another group of radio buttons, use [field-radiobutton-2]. You can have up to 100 groups of radio buttons.

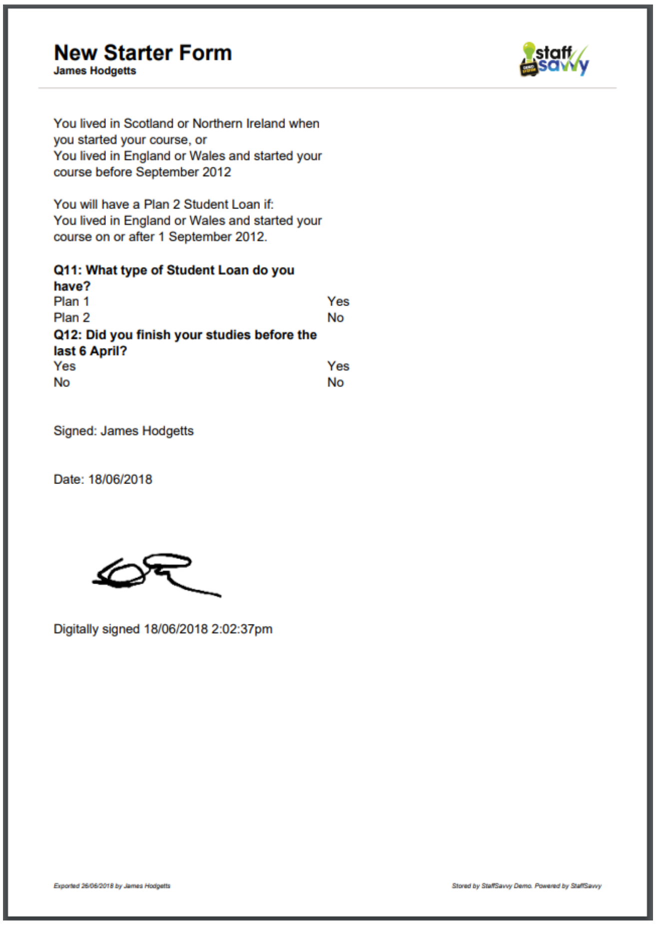
You can also decide where to place their visual signature on the template with a mail-merge field.

Finally, you can set the declaration text. This is the text that the staff member is shown and asked to confirm as they sign the document.

# Digitally Sign


Once completed, the digitally signed document is available to view online or download as a branded PDF.



**New Starter Form**
**James Hodgetts**

You lived in Scotland or Northern Ireland when you started your course, or
You lived in England or Wales and started your course before September 2012

You will have a Plan 2 Student Loan if:
You lived in England or Wales and started your course on or after 1 September 2012.

**Q11: What type of Student Loan do you have?**

| | |
|---|---|
| Plan 1 | Yes |
| Plan 2 | No |

**Q12: Did you finish your studies before the last 6 April?**

| | |
|---|---|
| Yes | Yes |
| No | No |

Signed: James Hodgetts

Date: 18/06/2018

Digitally signed 18/06/2018 2:02:37pm

*Exported 26/06/2018 by James Hodgetts* *Stored by StaffSavvy Demo. Powered by StaffSavvy*

### 4.20.1.4. Document Permissions

You have detailed permission controls per document type so that different documents can be accessed by different levels/line managers within the system. This prevents access to private information if required.

You can configure different rules for viewing, uploading and verifing documents. This is under Data Access Management when creating a new document.

Managers will need general access to view a staff member's documents to either View or Upload them in addition to the permissions on the document type.

For verification, the managers will need to have the generic permission to verify documents in addition to any requirements on the document type.

| | |
|---|---|
| Permission to view<br>*The subject staff member automatically has access* | ☑ **Access to anyone with permission to view document store (including staff member)** |
| Permission to upload<br>*Includes permission to view completed documents* | ☑ **Access to anyone with permission to view document store (excluding staff member)** |
| Permission to verify<br>*Includes permission to view completed documents* | ☑ **Access to anyone with permission verify documents** |

Note: there is now a new permission for verifying employment eligibility documents. This will apply to all system created document types.

## 4.21. Personnel Records

These records sit within the staff member's profile page and can automatically expire after a certain period of time.
When they are created, the manager is presented with a template they can customise and adjust for the staff member or incident concerned.

### 4.21.1. Created Personnel Record Templates

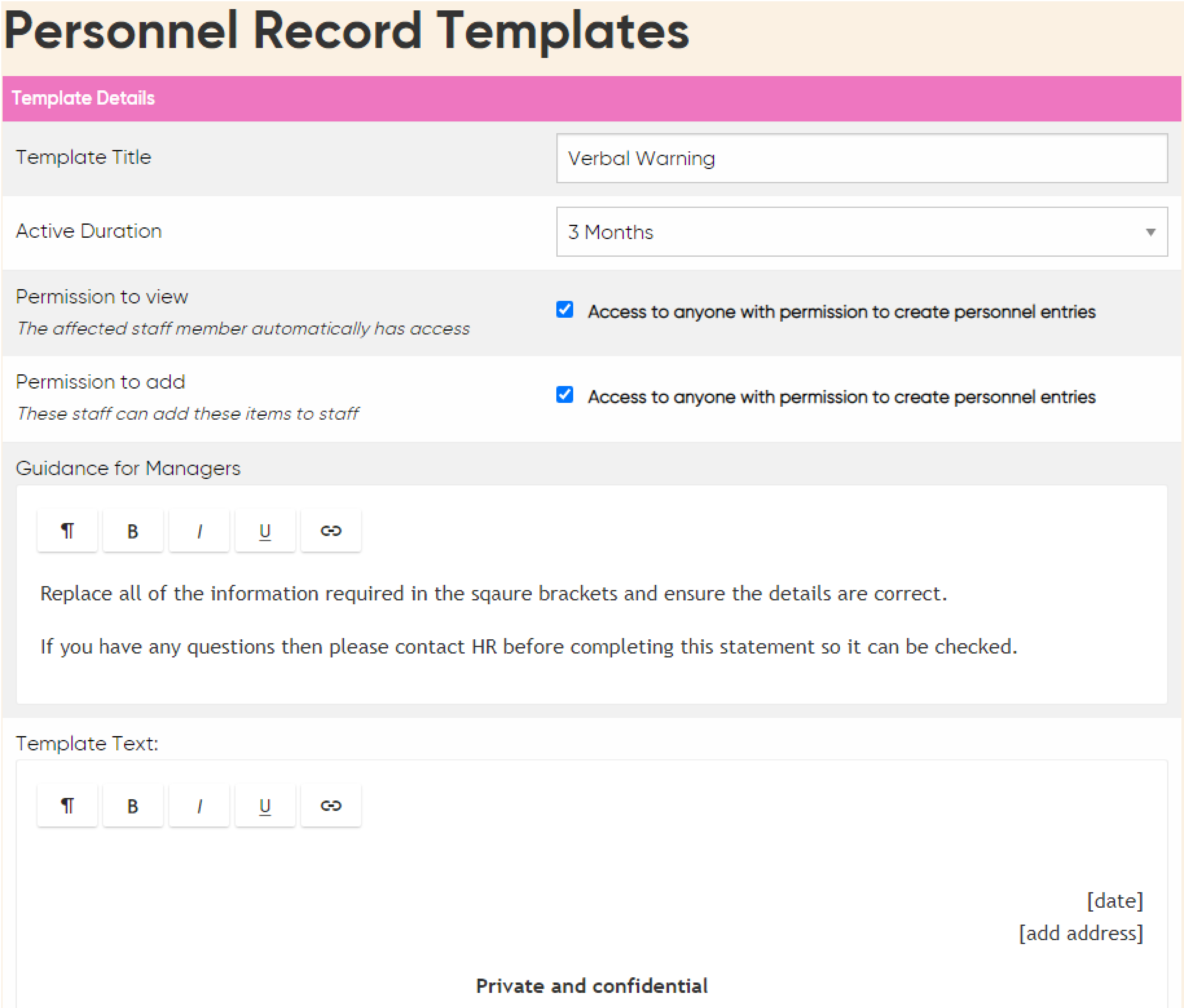
You can create and edit the record templates under System > HR Settings > Personnel Record Templates.

You'll be asked to provide a Template Title along with the ActiveDuration. All the active duration does is automatically move the items from the Active Records box to the Archived Records box.

Beneath these options are the permissions to view the records and who can add the records to the staff member's profile. Ensure the permission to view includes those who can add the records otherwise they won't be able to view the records they have added to a staff member's profile.

You then have Guidance for managers and the actual Template Text. The guidance is displayed above the template content when a manager is completing the record on a staff member's profile. The actual text is the template they will see and can edit.




Within the template text box you can add dynamic content tags such as [date] and [recipient] to automatically merge in some of the relevant details. A full list of the available options is displayed just below the text box.

#### 4.21.1.1. Requesting a Signature

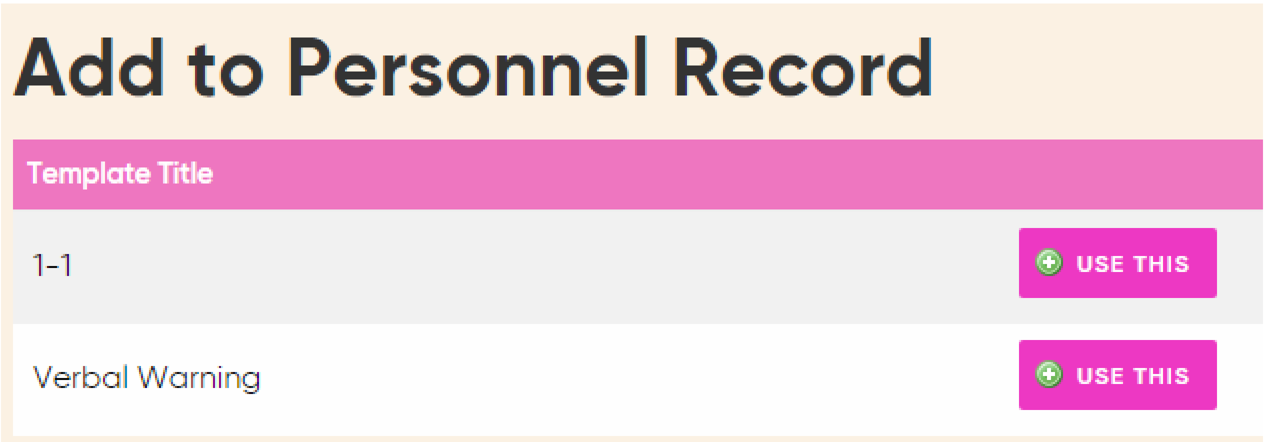
If you want the staff member to sign to acknowledge the record, you simply need to include the tag [recipient signature] within the text.

The system will recognise this and automatically email the staff member to inform them that a signature has been requested. It will also display on their dashboard.

### 4.21.2. Assigning a Record to a Staff Member

Under a staff member’s profile, use the Actions menu to find Documents > Add personnel record.

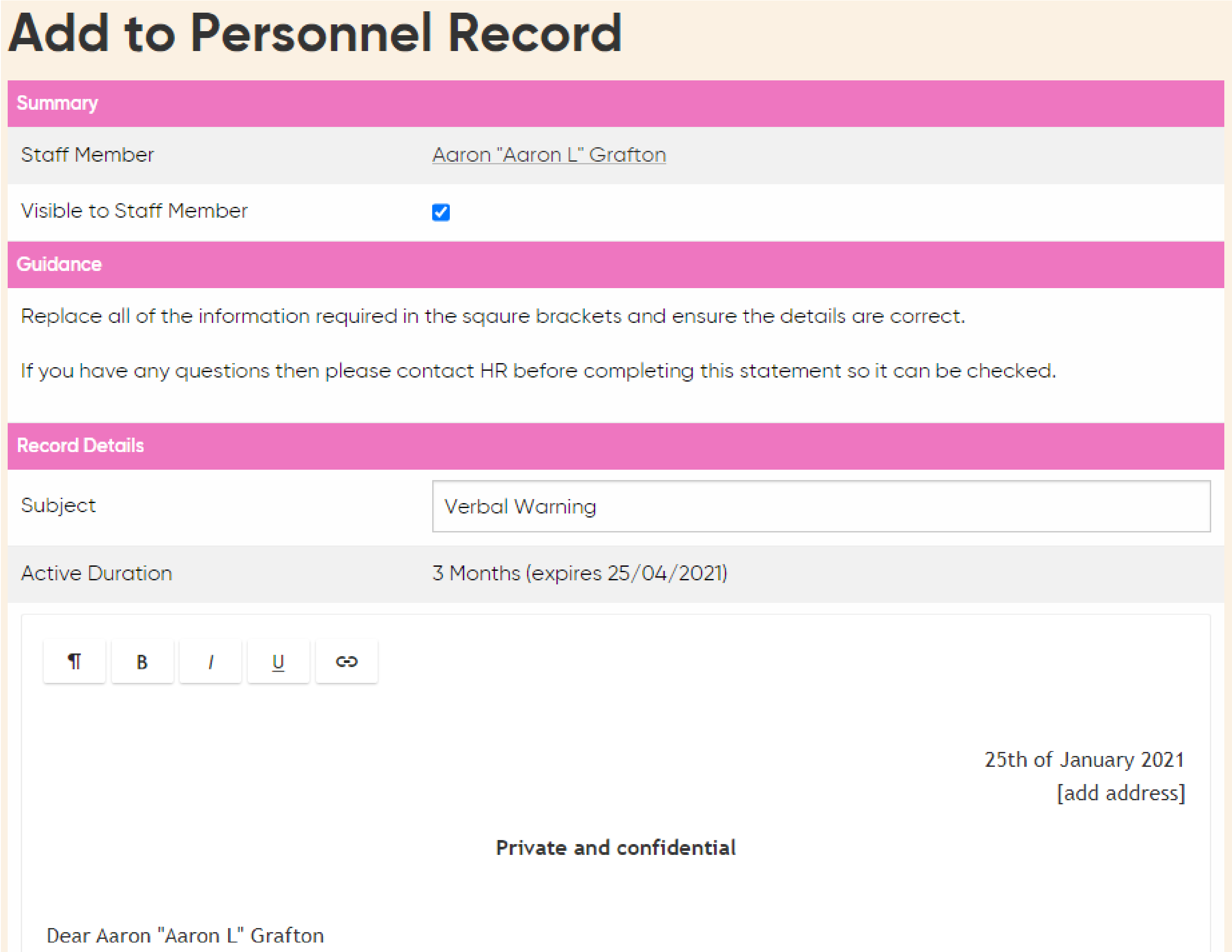
You will be shown a list of the record types you can assign:



StaffSavvy

And then will be shown the template text that you can update or expand before adding to the staff member's record.




Completed records will be displayed on the Personnel Records tab of the staff member's profile.

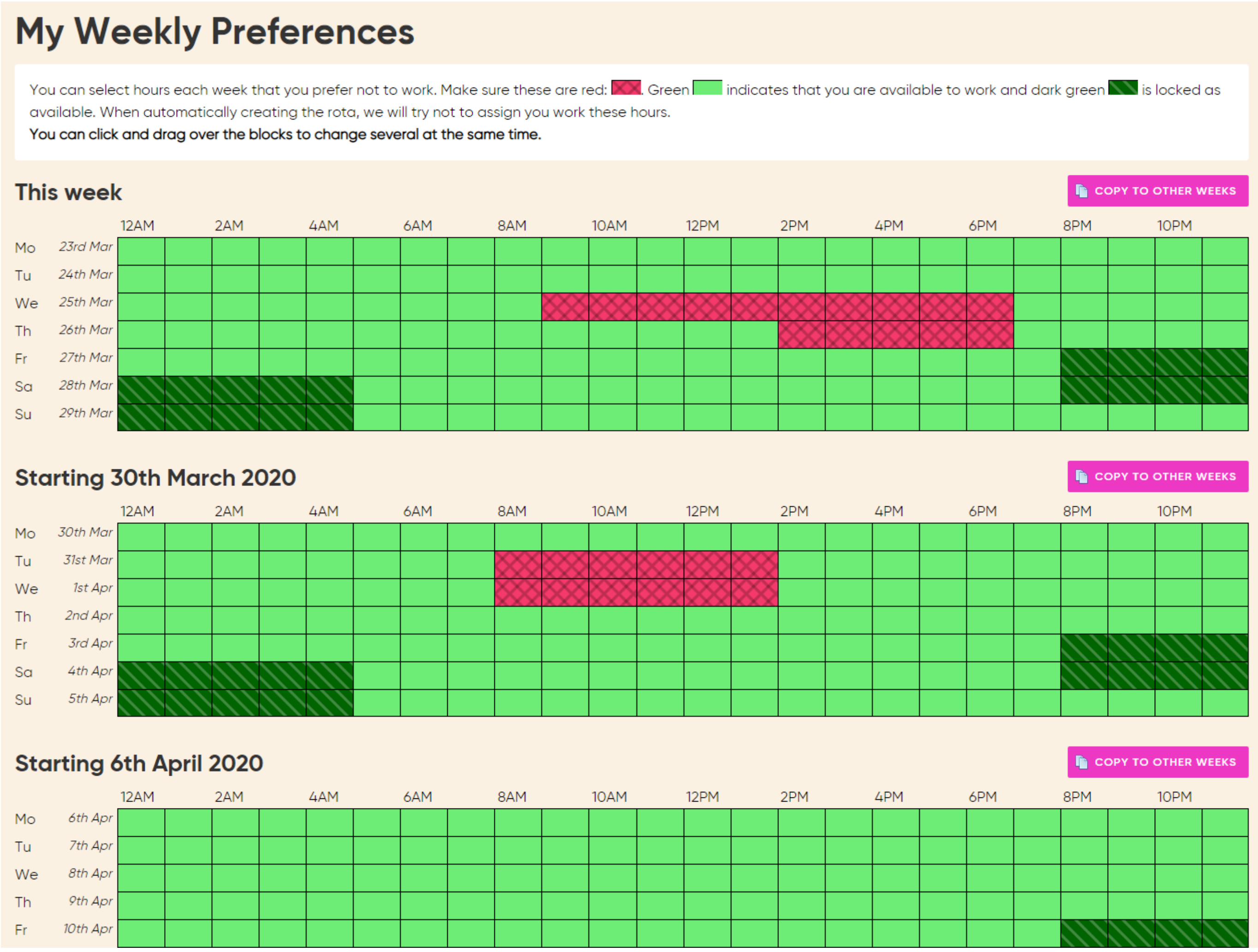
## 4.22. Staff Availability

### 4.22.1. Weekly Preferences

Staff can be allowed to provide their upcoming availability themselves without a manager approval process. This is done using weekly preferences found under My Account > My Availability > Weekly Preferences.

Staff are provided a view of a week (or multiple weeks) and can mark on the weeks the times/days they cannot work. Weekly preferences only affect new shifts and do not change existing shifts.

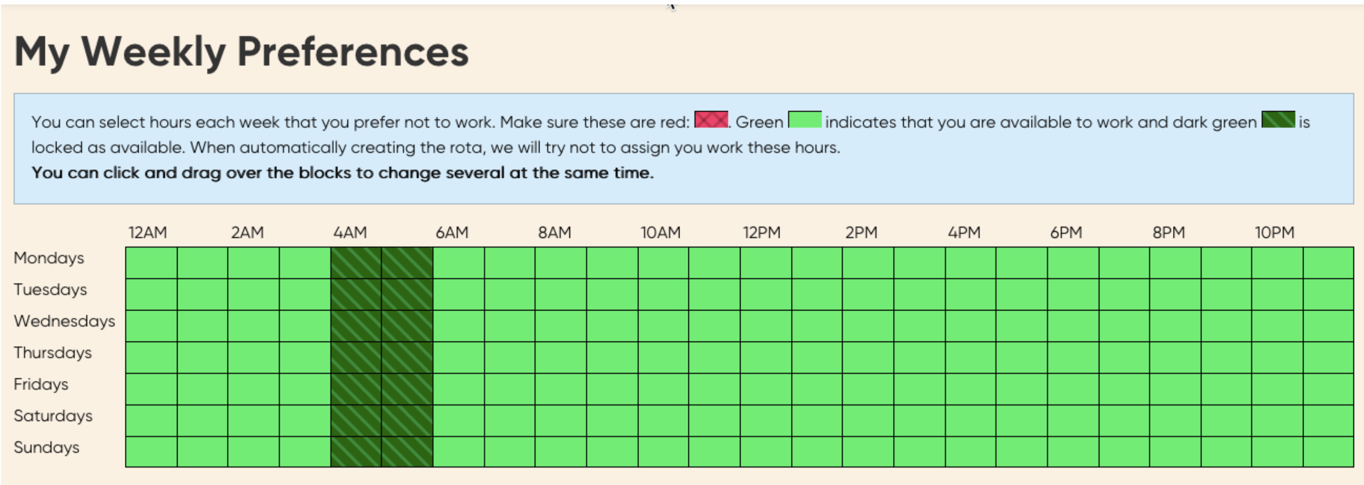



### 4.22.2. Reserved Hours (home venue)

You restrict the hours that staff members can reserve as well; this allows you to effectively block out sections of the week so that staff must put in holiday/time off requests (that are manager approved) if they wish not to work those times. This is very effective to prevent staff self-booking off your busiest times.

You can set these times per venue by using the 'Set Reserved Hours' option in the venue's settings. This can be found via System > Venues > Manage Venue > Edit Venue > Shift Configuration > Staff Availability. When applied, the staff members will see a dark green section where they cannot change their availability.




### 4.22.3. Reserved Hours & Default Availability (per contract)

In addition to setting reserved hours per venue, you can also apply reserved hours to a contract. This means that staff on that contract will also have these restrictions applied.

Furthermore, you can set default non-availability on the contract. This means that unless staff change it, the system will apply the default availability. This is useful if your employment agreement with them says they will not be asked to work outside of specific hours without their consent.

Set contract reserved hours and default availability on the contract itself via Pay > Contracts > Manage Contracts.

### 4.22.4. Availability Time Block Rules

This feature has the ability to add complex rules to the weekly preferences page so that staff cannot book combinations that cause issues with full team availability. Within each rule, you can set a number of blocks and then limit how many of the blocks can be self-reserved.

For example, you might have a rule that could allow your staff to book off a Friday night or a Saturday night but not both. Or you could book off the first weekend but not the second.

Currently these complex rules are applied to the home venue underSystem > Venues > Manage Venues > Set Reserved Hours. Click the more button next to the venue. The rules are at the bottom of the page.


### 4.22.5. Number of Weeks

The system can support from one to twelve individual weeks. This means staff can book up to 12 different weeks of availability in advance. We recommend you only provide the number of weeks necessary. You can simply ask them to complete a typical week and that week will be repeated.

If you work with a lot of students who have a two-week educational time table then you might allow them to schedule two weeks and then repeat.

By default, staff weekly preferences will be kept and repeated. This means staff just need to adjust their availability. You can also instruct the system to forget their availability as they must provide it afresh every time.

### 4.22.6. Maximum Reserved Hours

Managers can set a maximum number of hours staff can book as unavailable each week. Once this limit is reached then they will need to put in a holiday request or Unpaid Time off request (depending on their contract).

### 4.22.7. Minimum Gap

The minimum gap setting enforces a period of time after some non-availability where staff must be available. It works hand-in-hand with maximum hours so that staff cannot simply request one hour off every 3/4 hours and block all shifts for a single day. They must use up their minimum hours off as a solid set of unavailable hours rather than exploiting the system and setting a checkerboard of unavailability.

### 4.22.8. Show Week Numbers

This decides if the weekly preferences are shown with week numbers or not. Week numbers allow staff to see which week number they are on out of the number of weeks you allow them to set. This can help to match it to other timetables.

#### 4.22.9. Staff Choice of Hours

This option allows staff to set how many hours they would like to receive in that given week. They can choose a number of hours between their contracted minimum and contract maximum hours.

This information will be used by the schedule creation tool to assign hours to staff. It's also displayed within the transfer shifts popup so you can allocate additional shifts to those who want them.

#### 4.22.10. Remember Preferences

This option will remember staff preferences from week to week. For example, if you only allow one week of preferences to be set then their preferences will be repeated every week. If you allow 10 weeks then the system will loop through the provided availability weeks. This is recommended as it enables most staff to set their preferences less often.

#### 4.22.11. Lock Weekly Preferences

This is an option to prevent any staff based at this venue from editing their preferences at all. This is **not necessary** as the system is designed to cope with continuous changes and existing shifts will not be affected by any changes in the weekly preferences.

#### 4.22.12. Holiday / Time Off

##### 4.22.12.1. Understanding Holiday

There are two main types of paid holiday managed by StaffSavvy:

- **Fixed Entitlement**

  This is a fixed amount of holiday a staff member receives at the start of the year and can book any time during the year.
- **Earned Entitlement**

  This is a holiday that is earned per hour worked and is either immediately paid out or stored so the staff member can claim it in the future.

Holiday rules are configured via a contract. Under the Holiday tab, you can choose the type of holiday StaffSavvy should apply.

- **Disable holiday pay and entitlement**

  We'll hide holiday options for this staff member. They can still request time off.

- **Pay holiday as percentage of hours worked in wage sheets**
  Using the percentages and rates set under each pay element, automatically add holiday for every hour worked.
- **Earn holiday based on hours worked and claim with holiday request (Earn and Claim)**

  Same as above but it will not automatically add it for payment but store it on the staff member's account for them to claim with a new holiday request.

  'Earn and Claim' does not include hours already paid under a previous contract holiday mode.

  When a new contract is signed, if someone was paid holiday under another type of holiday (e.g. automatic payment or yearly entitlement), and then moves to earning and claiming holiday, their total "claimed" holiday will no longer include any hours already paid out using a different method.

  This means that when the new contract is started, it will not be affected by previous holidays and will be worked out by how many hours a staff member has worked in accordance with Earn and Claim.

  To change how holiday pay is managed for each contract, go to Pay > Contracts > Manage Contracts > Edit > Holiday.

- **Earn holiday based on pro-rata entitlement and claim with holiday request**
  Based on an expected hours per year, the system will provide a % of their yearly holiday allowance to them based on the % of the yearly hours expected that has been worked.
- **Fixed yearly entitlement**
  A fixed number of hours or days per year that the staff member has available.
  Note: You can add/subtract hours from a staff member's entitlement within their account so most staff can share a contract and have adjustments added this way.
- **Fixed yearly entitlement (prorated)**
  A fixed number of hours or days per year that the staff member has available. This is adjusted down if the staff member starts or finishes the assigned contract during the holiday year.
  Note: You can add/subtract hours from a staff member's entitlement within their account so most staff can share a contract and have adjustments added this way.
- **Fixed entitlement with pay calculated on previous x weeks**
  This option allows staff to have a prorated holiday allowance however their pay is calculated on a

number of previous weeks (as defined) so that their holiday pay reflects the hours per week they have recently been working.

There is a max number of days per week to be deducted when using simple mode. Only days that you are contracted to work will be deducted from your holiday entitlement.

| | |
|---|---|
| Holiday Required (expected) | • 1 DAY Wednesday 22nd Jun 2022<br>• 1 DAY Thursday 23rd Jun 2022<br>• 1 DAY Friday 24th Jun 2022<br>• 0 DAYS Saturday 25th Jun 2022 NON-WORKING DAY<br>• 0 DAYS Sunday 26th Jun 2022 NON-WORKING DAY<br>• 1 DAY Monday 27th Jun 2022<br>• 1 DAY Tuesday 28th Jun 2022<br>• 1 DAY Wednesday 29th Jun 2022<br>• 1 DAY Thursday 30th Jun 2022<br>• 1 DAY Friday 1st Jul 2022<br>• 0 DAYS Saturday 2nd Jul 2022 NON-WORKING DAY<br>• 0 DAYS Sunday 3rd Jul 2022 NON-WORKING DAY<br>• 1 DAY Monday 4th Jul 2022<br>• 1 DAY Tuesday 5th Jul 2022<br>• 1 DAY Wednesday 6th Jul 2022<br>• 1 DAY Thursday 7th Jul 2022<br>• 1 DAY Friday 8th Jul 2022<br>• 0 DAYS Saturday 9th Jul 2022 NON-WORKING DAY |
| Total Holiday Required (expected) | 13 days **(based on known shifts)** |
| Available Holiday | 22 days |

There are then various options around how a holiday is treated. You can display the holiday in days (all requests will be rounded up to the nearest half day) or hours (this will record holidays to the minute).

Calculation Method allows you to choose either a basic or complex calculation method. The basic option basically only assigns a full or half day per calendar day and is perfect for simple holiday policies. Complex option will use shifts to carefully calculate holiday usage down to the minute. It's much more detailed but not always desired.

Hours per day is important as this informs the system of how many hours a full day counts as. So if an employee has 7 hours per day on average and requests 3 hours off in the morning, this would count as a half day. If they requested 5 hours off then it would count as a full day.

The Holiday Days start time is also important as it tells the system when a holiday day should start; if someone requests 12 hours off from 1pm until 1am but their start time is 9am then it would only deduct 0.5 days as most of the request falls outside the normal hours.

Holiday Days and National/Organisation Holidays options allow you to set which days should count for holiday requests. This can be overridden per request but it's easier to configure this correctly at the start.

Finally, the Existing Shifts option. There are two ways the system can apply holiday, either ignoring the existing shifts the staff member has or using them for the calculations.

If you choose to ignore the shifts, the system will use the fixed hours per day settings to calculate how many hours a holiday request will require. If you use the existing shifts then it will review the shifts assigned for that staff member and use their hours to calculate the holiday request.

Using the existing shifts is perfect for someone on a complex working pattern that has been setup using the regular repeating shifts feature. Ignoring the existing shifts is perfect for most operational staff where they won't know their shifts until a few weeks before and holiday requests are scheduled much further in advance.

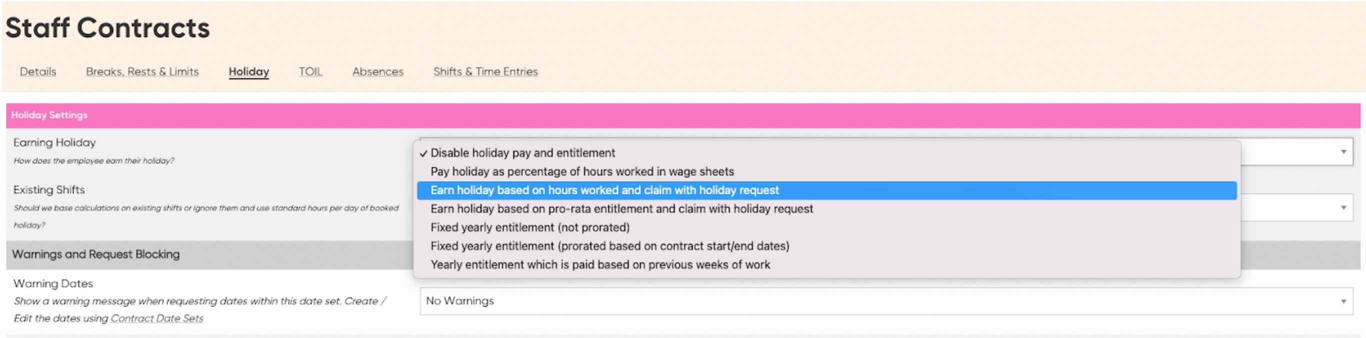
## 4.23. National and Organisation holidays

You can view National and Organisational holidays by going to the schedule creation calendar. To view a list of the registered organisation and National holidays currently in the system go to System > HR Settings > Organisation Holidays. Here you can add new organisational holidays and can also view the National Holidays already implemented by the Staff Savvy system.

| | Date | Title | |
|---|---|---|---|
| ORGANISATION | 21/06/2022 | Team Building Day | DELETE |
| ORGANISATION | 24/06/2022 | Fiesta Friday | DELETE |
| NATIONAL HOLIDAY | 29/08/2022 | Summer Bank Holiday | |
| NATIONAL HOLIDAY | 26/12/2022 | Boxing Day | |
| NATIONAL HOLIDAY | 27/12/2022 | Christmas Day (substitute day) | |
| NATIONAL HOLIDAY | 02/01/2023 | New Year's Day (substitute day) | |
| NATIONAL HOLIDAY | 07/04/2023 | Good Friday | |
| NATIONAL HOLIDAY | 10/04/2023 | Easter Monday | |

To view these holidays go to Shifts > Schedule Creation > Manage Schedule. Here you can see both National and Organisational holidays. They will come up at the top of the day they are scheduled for.




### 4.23.1. Automatic Holiday Shifts

Holiday Shifts are created three ways:

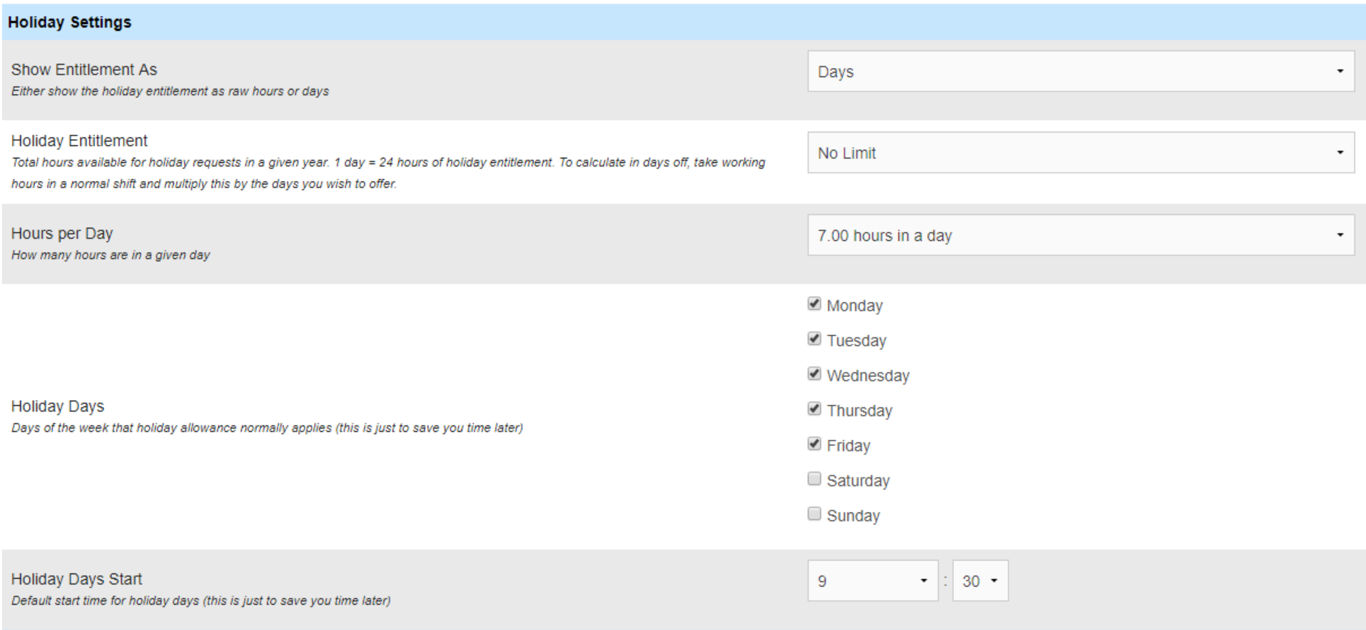
- **Existing shifts**
  Any existing shifts within a holiday request are converted to a holiday shift when the request is approved.
- **Manually added**
  Holiday shifts can be added beforehand or afterwards by adding a holiday shift on the Manage Shift Week view and Weekly Timesheets.
- **Estimated Holiday Shifts**
  These use information saved in the staff member's contract to quickly create holiday shifts. This is the recommended method for permanent staff as it reduces a lot of admin time.

All three options can be used together as needed.

### 4.23.2. Estimated Holiday Shifts

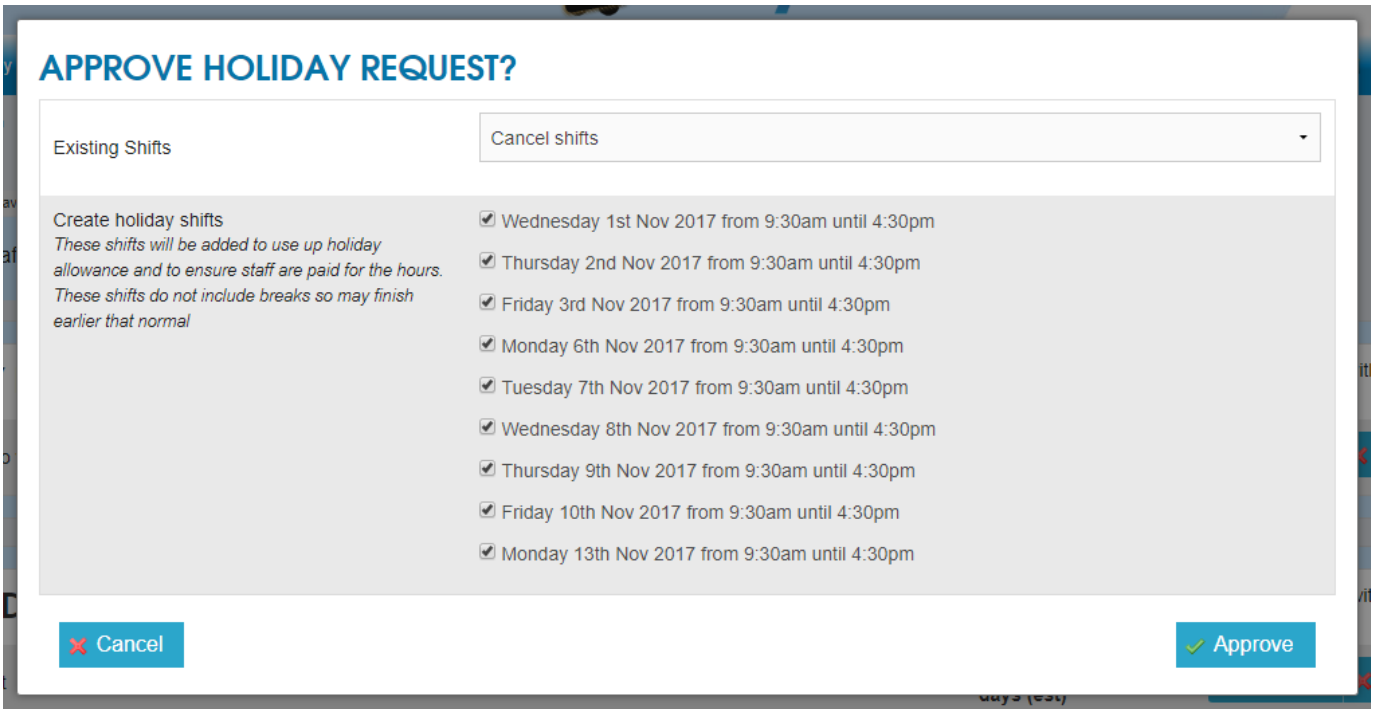
Under each contract, you can set how many hours are in a "day". This should be how many hours are considered an average working day. Following this, you can set which days of the week should be used to calculate holidays. These should be the days of the week that the employees are expected to work normally. Finally, you can set a start time.




With this information, StaffSavvy will calculate the number of days of holiday a request needs and will ask the approving manager to confirm the holiday shifts.

In the example below, the request covers just under two weeks. The employee is expected to do 7 hours each day, starting at 9:30am. The employee does not work weekends.
StaffSavvy has estimated the shifts from 9:30am to 4:30pm (breaks are not applied to holiday shifts so they are shorter than a normal working day).



The manager can leave all of the days checked to have these holiday shifts added automatically. If one or more of the days should not count as holiday then then can be unchecked.

Holiday shifts can be edited in the same way as a normal shift once they are created.

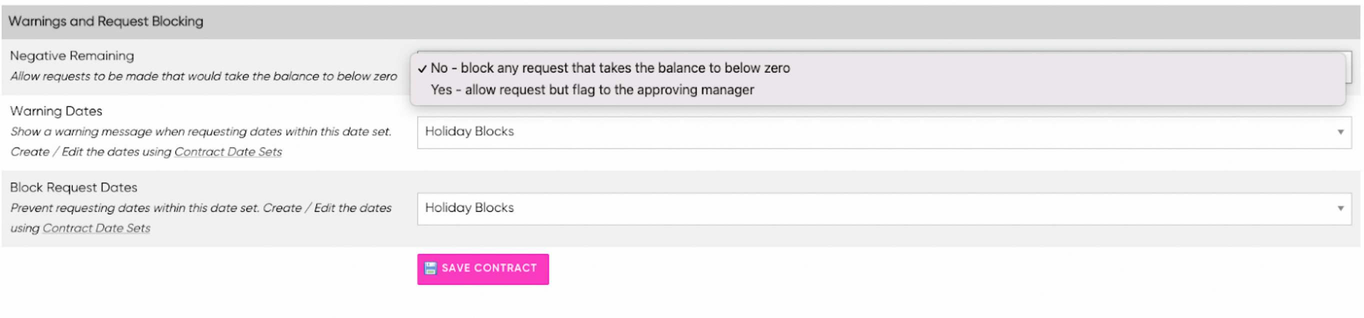
### 4.23.3. Add holiday on behalf of an employee

You can grant permission to certain managers so they can create holiday requests on behalf of their staff. See the permission called "Add holiday / Time off requests on behalf of staff".

This allows requests to be added via the staff member's profile page. Just click on Actions > Holidays and Absence > Add Holiday Request.

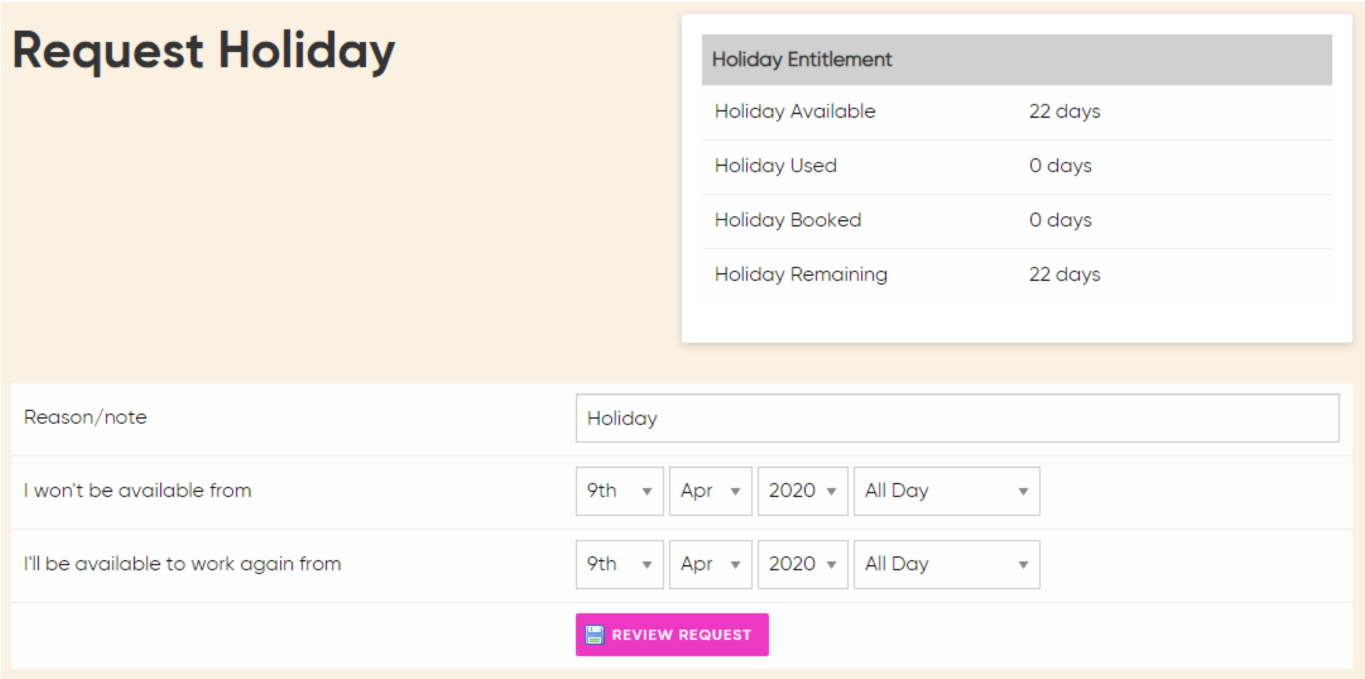
*Holiday requests will be automatically blocked if they would leave a negative balance.

This can be disabled under each contract's settings for contracts that come under Fixed yearly salaries, where there is a set holiday limit measured annually. To find this go to Pay > Contracts > Manage Contracts > Choose the contract you want to edit > Holiday.



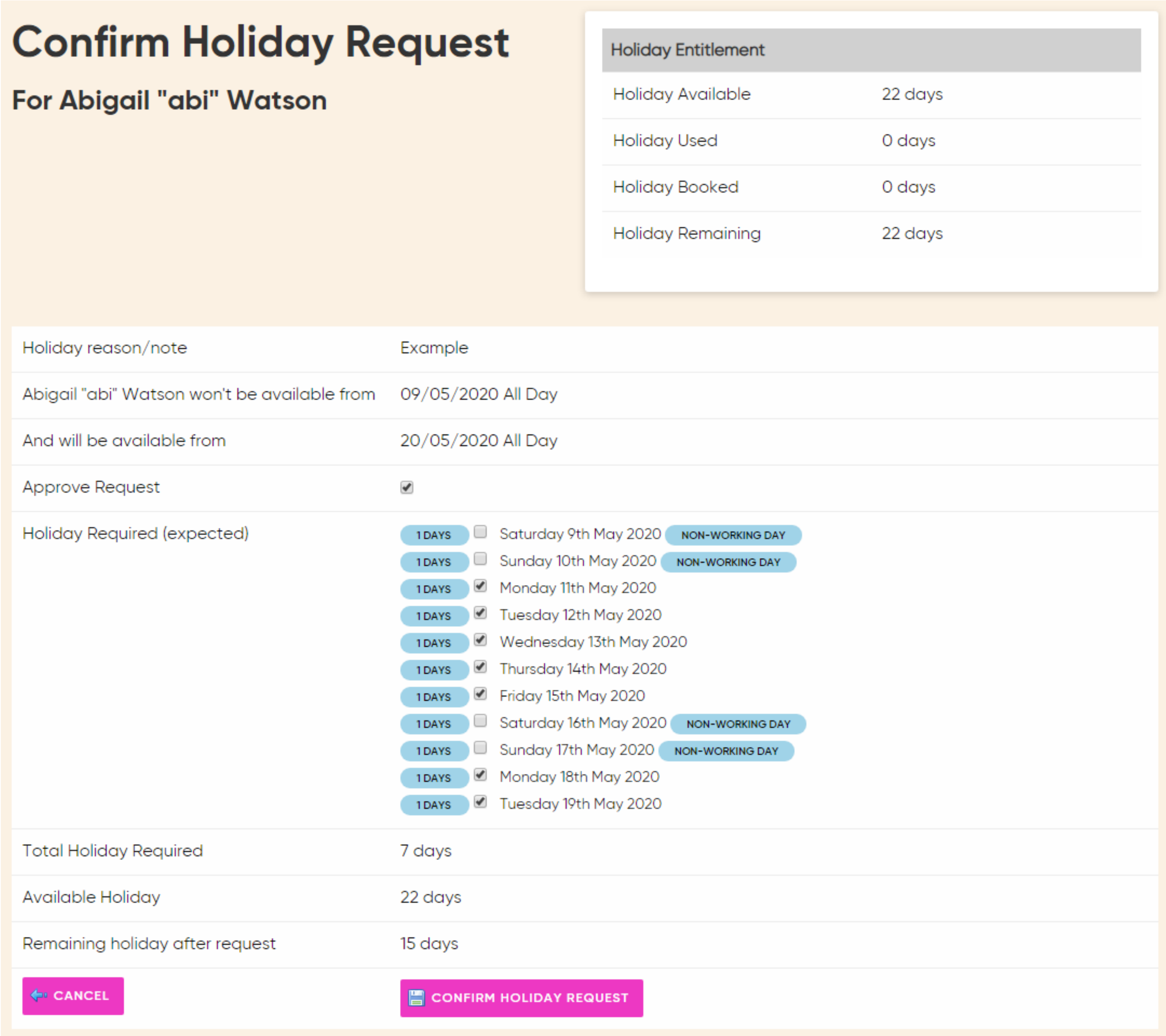

The request is in two steps; provide the basic information such as reason and dates first and then confirm the request and holiday shifts.




From this request, StaffSavvy will suggest a series of holiday shifts. Un-selecting the shifts will recalculate the holiday required and holiday remaining totals at the bottom.




### 4.23.4. Tentative Approval

When approving a holiday, if the staff member has shifts and they are not cancelled or reposted for cover (so the shifts remain assigned to them) then their holiday will be marked as tentatively approved.

It will automatically change to approved when they find cover for those shifts.

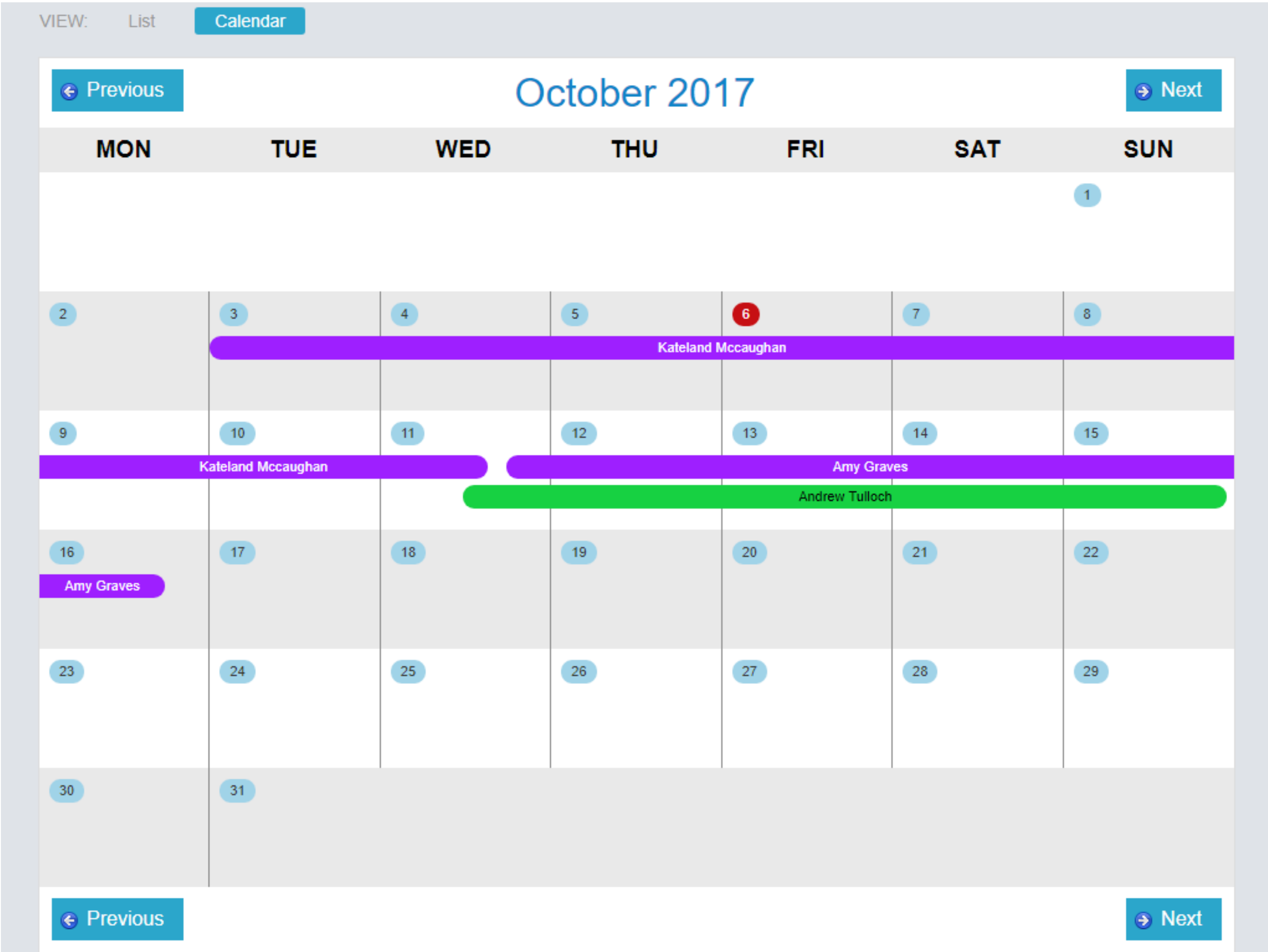
### 4.23.5. Holiday Calendar

There is a holiday calendar view that can display any combination of staff holidays (casual, permanent, venue staff etc). This can be found under  Reports > Staff Reports > Absence Calendar.

Each holiday will be shown as a coloured bar across the page; the colour is taken from the staff member's default role so you can see how the roles crossover.

The calendar view also shows the time of day the request starts and finishes so you can see who is available at any one time and if there is a period when staff are not available.




## 4.24. Squads (Teams)

These are smaller groups of staff often within a single venue that are grouped together for purposes of training, socialising and team competition. Squads can also be used for sending news, emailing / SMS the squad directly and assigning alerts.

They are officially called Squads however many organisations have labelled them as teams.

A staff member can only be in one squad for the whole organisation which makes it most suitable for home venues. However, staff from different venues can be in the same squad.

To organise your squads use the Staff Squads (or Teams) link under Staff Settings. This will display a page with all of your staff and the option to create a squad.


You simply drag and drop staff members from the unassigned list on the left of the page to their respective squad.

# 4.25. Absence Policies & Reporting

Until now, attendance was always linked to shift attendance. These features allow the ability to record attendance and non-attendance without shifts.
In addition, you can create complex policies to manage attendance between your staff. For example, the system provides a policy that manages Statutory Sick Pay automatically for staff. This includes calculating 'Waiting' and 'Eligible' days. This can be managed under Dashboard > System > HR Settings > Manage Absence Policies.
It will also correctly continue a single instance of sickness even if they return to work for short periods of time under the SSP rules.

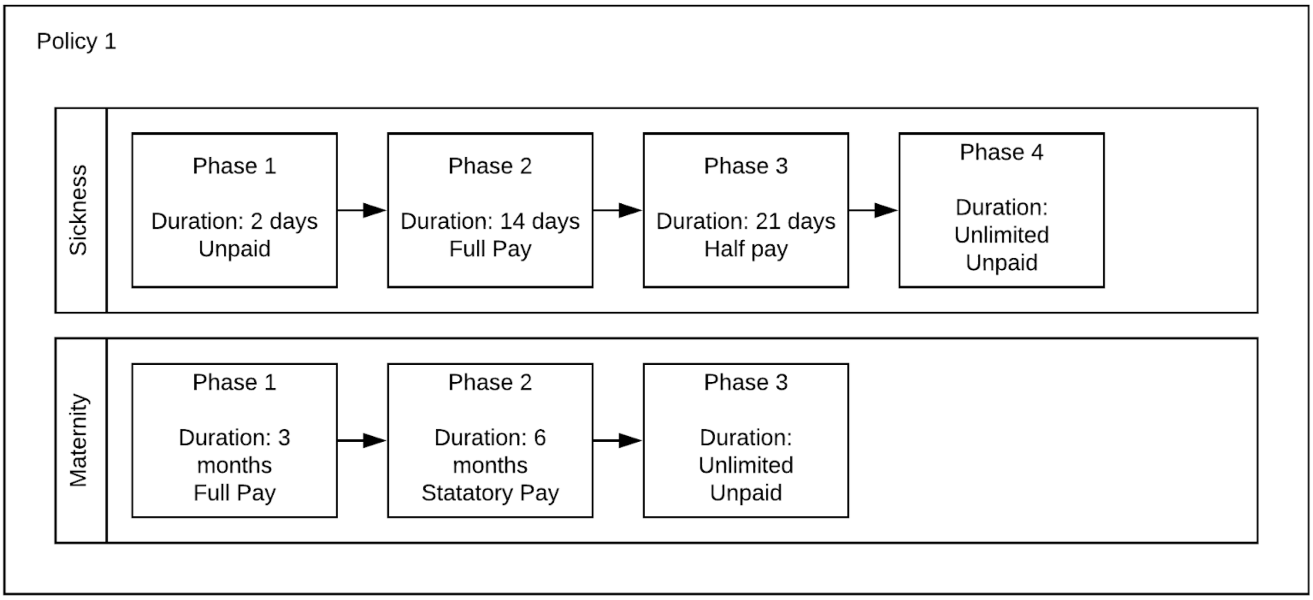
## 4.25.1. Absence Policies

Policies are the group of different rules that you can assign to a contract. You can have as many different policies as you like and assign them to any combination of contracts. This allows you to have different policies for different types of employment and also adjust policies over time while maintaining your older policies for staff employed at that time.
Manage your policies under System > HR Settings > Manage Absence Policies. Add a new policy under the Actions menu.

Each policy holds Policy Entries for different types of absence. So you can have a set of rules for Sickness and a different set for maternity under a single policy.

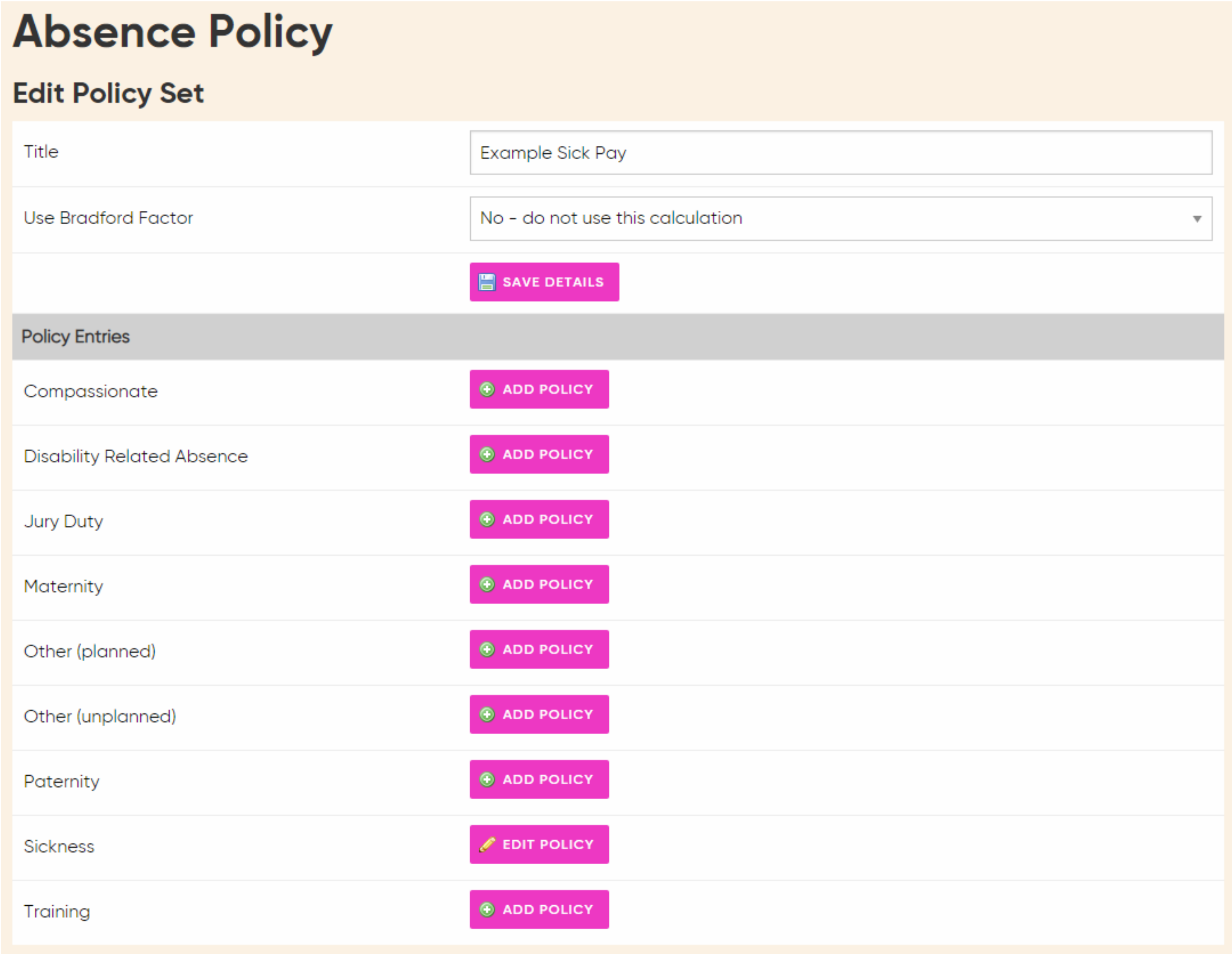
Under each policy entry (e.g. sickness) you then have phases. These phases dictate how the policy works; e.g. two months full pay, 6 months unpaid. And the system will automatically calculate these phases when someone is absent.

The structure is shown below:




Once you are named your new policy, you can edit the set of policies attached.

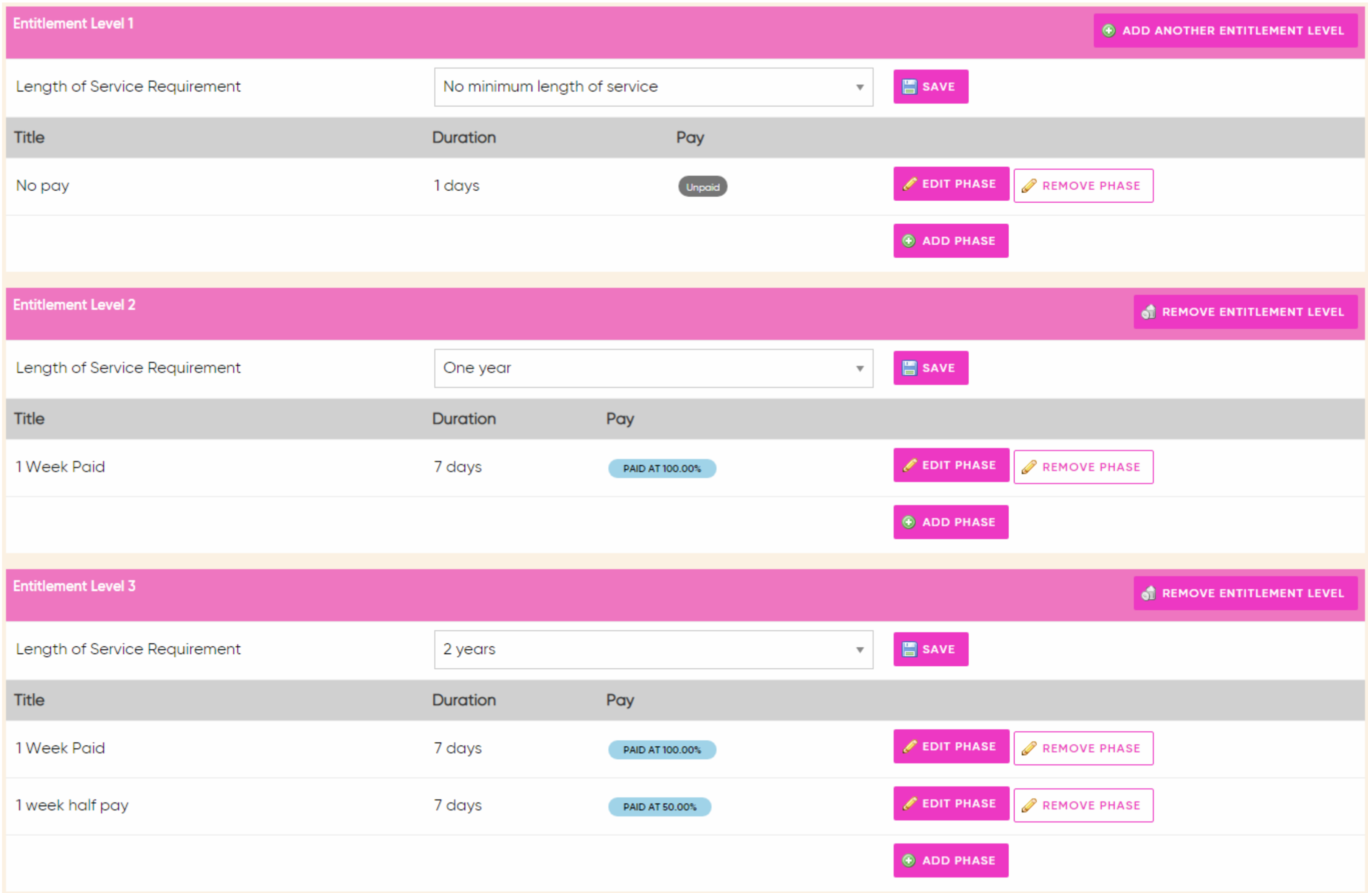
 




Each type of absence can have their own policy assigned. For example, the sickness policy might be made up of three phases. The first being unpaid, the second paid a full amount and a third at a smaller amount.

Additional absence reasons can be added at the top of the Absence Policies list. This will allow you to add any custom reasons you wish to your policies. You can then expand these custom reasons with detailed policies.

The screenshot below will show the three different phases.




You can have as many phases as required and each phase can have different durations and pay items. The pay items instruct the system to add one of those pay items into the payroll system on those eligible days. For example, there is a SSP pay item that will pay a full-day of SSP when someone is absent and eligible.

We're also able to export the information stored here for your payroll system; please get in touch with StaffSavvy support so we can discuss how best to provide this information for your payroll system.

The Linked Period option allows you to link this phase together with a previous absence. For example, if absence happens again within X weeks then the system will continue this phase rather than restarting the phases.

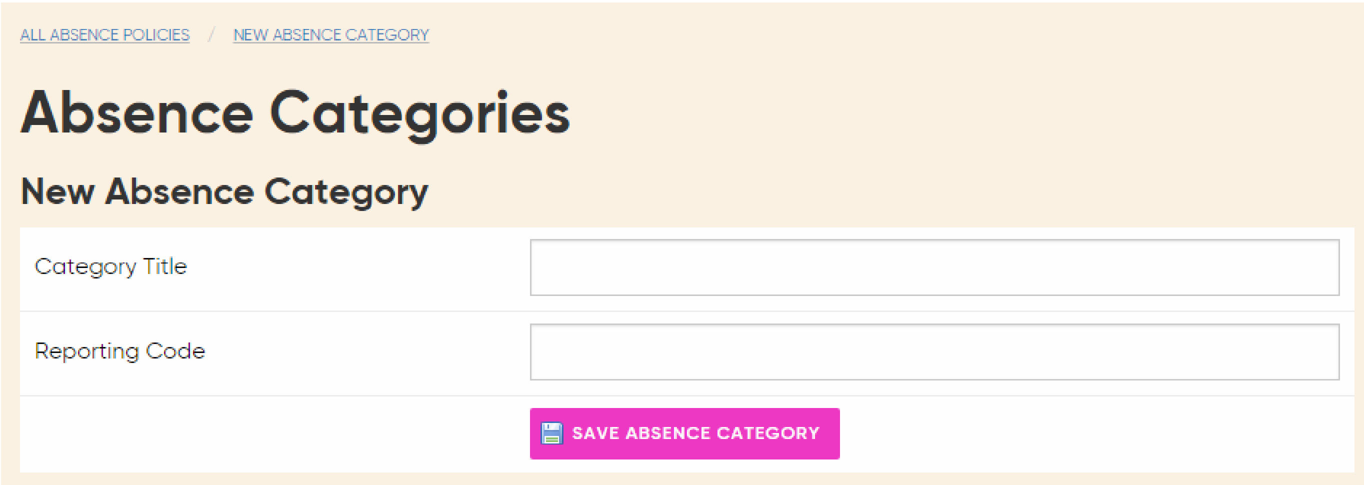
In addition to simply having one set of phases, you are able to have different sets of phases for different lengths of service. This allows the system to offer different amounts of paid absence depending on how long the staff member has worked at the time of the absence. This is based on their Continuous Employment Start Date.

### 4.25.2. Absence Reason Categories

In addition to the absence reasons, you can add different categories within that absence reason to further break down all reasons for absence. For example, you might have different medical reasons within Sickness.

These categories can be set for a period of absence and be used in reports for more detailed analysis.

To create a category, simply view the absence policies and use the Manage Absence Reasons at the top in the Actions menu to view all Absence Reasons. Then use the Edit Reporting Categories to manage the categories for each absence reason.

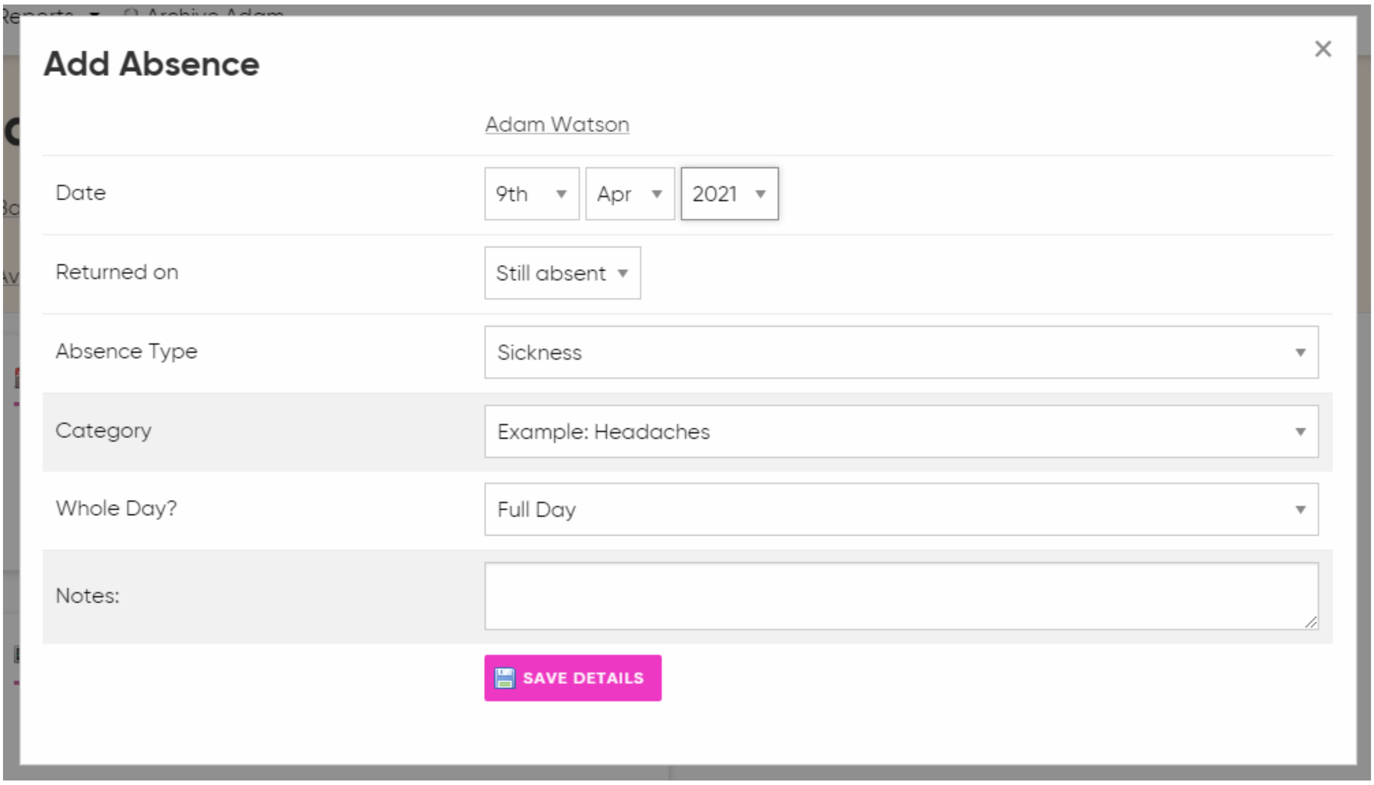



### 4.25.3. Reporting Absence

You can now report absence on a shift, in advance with an absence booking and retrospectively from the staff member’s profile page.

The screenshot below shows the popup where the line manager can quickly add a day of absence. Access this under a staff member’s profile page who has been assigned an absence policy set (even if it’s empty).

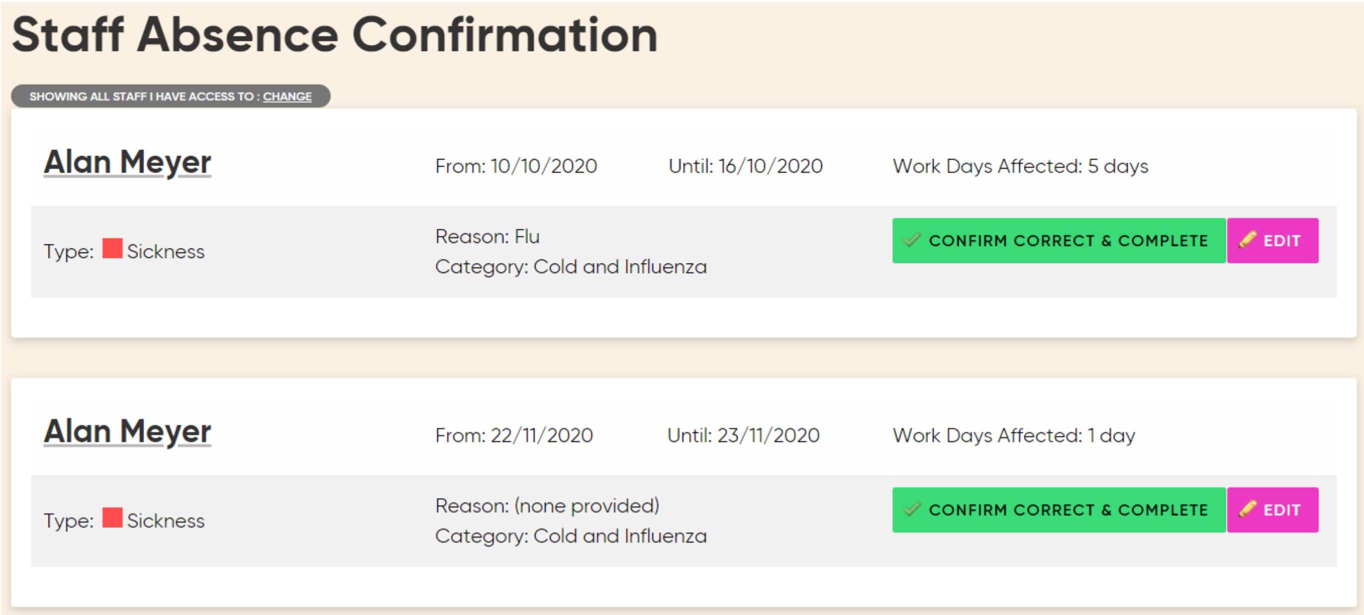
 


Add Absence
Adam Watson
Date
9th
Apr
2021
Returned on
Still absent
Absence Type
Sickness
Category
Example: Headaches
Whole Day?
Full Day
Notes:
SAVE DETAILS

# 4.26. Past Sickness Confirmation process;

If a staff member that has been sick and submitted it after a period of absence, it will automatically display within the notifications panel for the staff who have permission to review their absences.




Each absence will be shown with the type, reason and category (if applicable). It will include the dates and the number of working days affected.

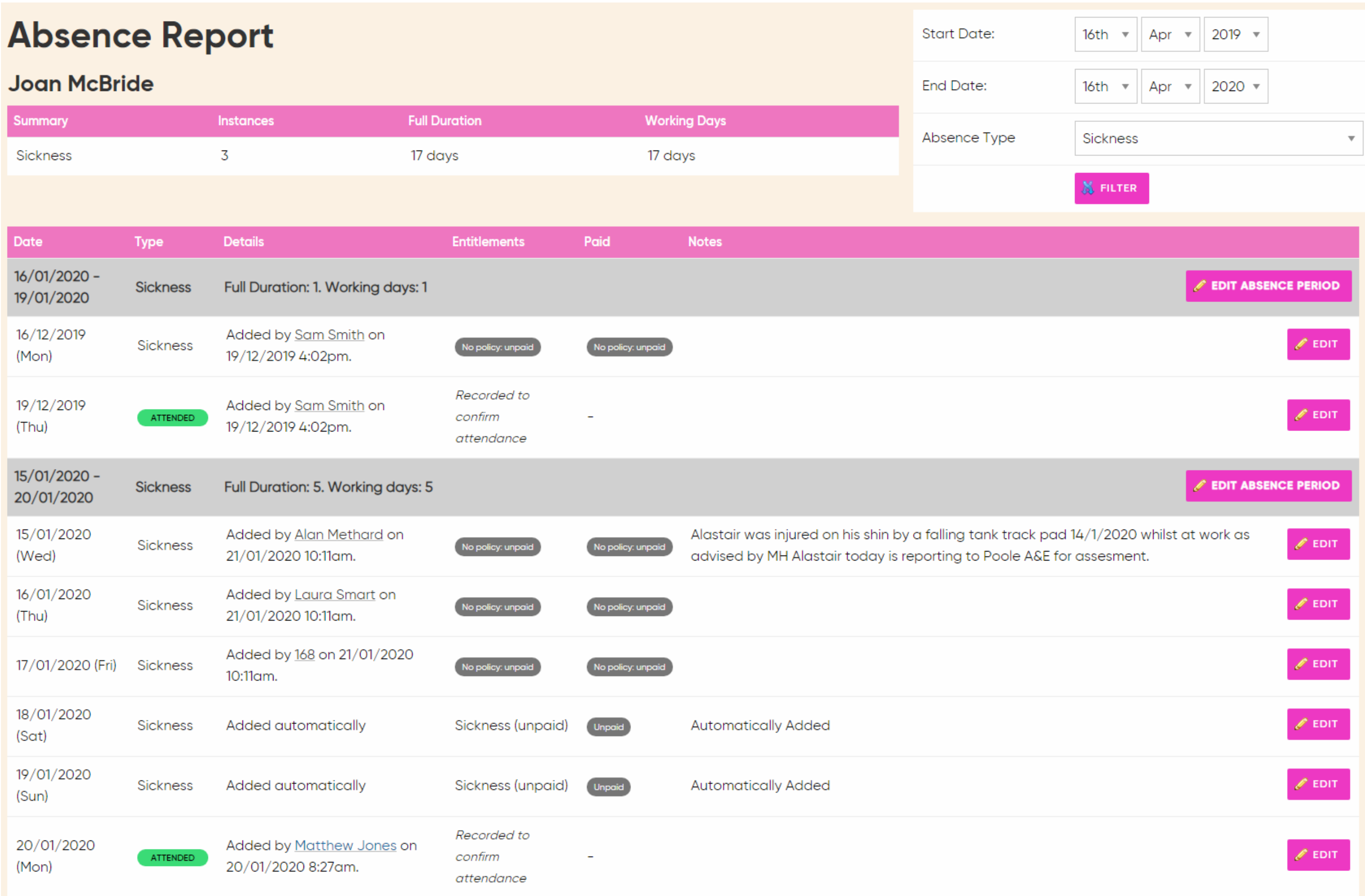
'Display confirmation requirement for sickness that has been closed' (This will require managers to review and confirm the absence).

They cannot confirm the absence while there are outstanding Performance and Welfare forms linked to that absence.

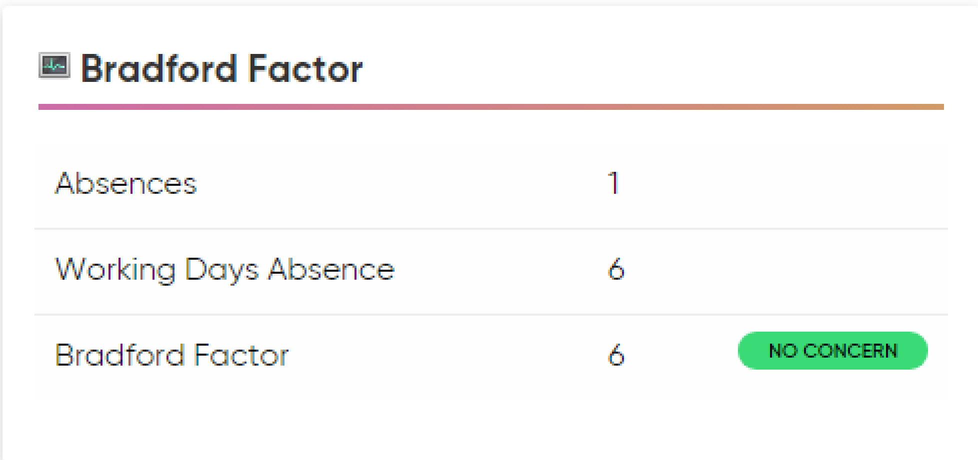
## 4.26.1. Reporting on Absences

The absence reports are available under the staff member's profile via the Absences tab. From here you can view an Absence Report. These reports will show you all instances of absence and how they are processed within the policy phases. You also have quick access to edit an absence or add an absence from the Actions menu.




The absences will also automatically be used to calculate the staff member’s Bradford Factor:



### 4.26.1.1. Upload Documents to Absence

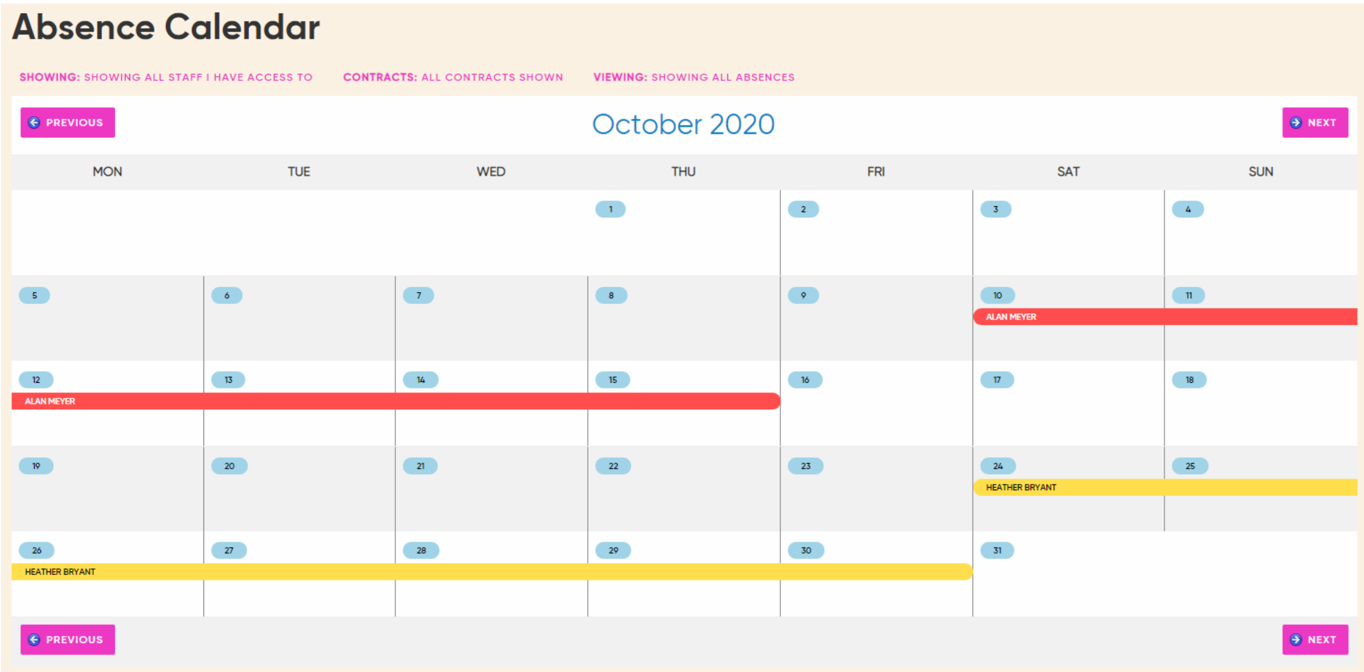
The system can assign documents to absence periods using two different methods; either manually by a manager using the absence report and the 'Upload Document' button next to each absence period.

The other method is using triggers. The length of absence trigger can be used to create a task that requires staff to upload a document (such as a medical note). The system will automatically link the upload document back to the absence for which the task was created.

### 4.26.1.2. Calendar Report

This report allows you to view all types of absence for a whole team within a single view using colours and patterns.

Using the filters at the top, you can choose to show a whole team or direct reports. You can also customise which types of absence is being shown and if you want to see all staff in the team or only those with certain contracts in use.



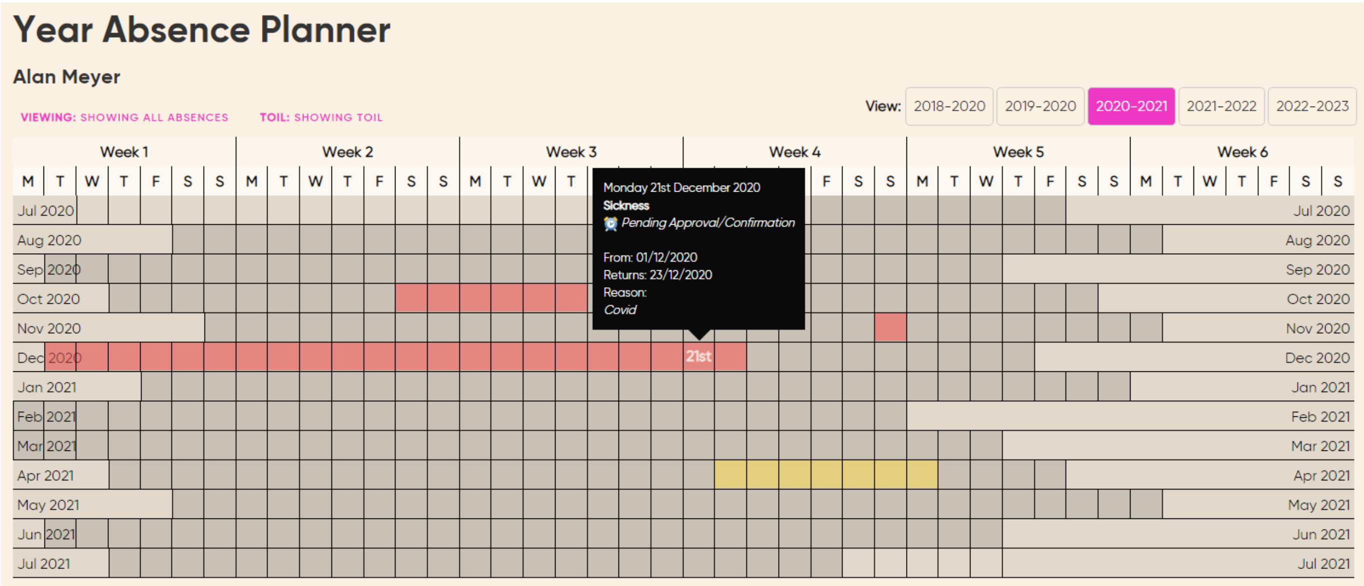

Clicking on the absence will display further details about the absence including the type, description, reporting category, dates and who approved/reporting the absence.

### 4.26.1.3. Year Absence Planner

This great report allows you to view all types of absences plus TOIL requests/claims across a complete year for a staff member. Absences are colour and pattern coded along with displaying requested and approved

absences/holidays.
You can access this view under each staff member's profile using the Absences & Holiday action menu.

Once on the report, you can select which absence types you wish to show. Using the option in the actions menu at the top.




Note: if you have custom absence types, you will need to choose colours and textures for each of the types. Do this under the settings for the absence types. Dashboard > System > HR Settings > Absence Policies. Use the Edit Absence Types in the actions menu.

# 4.27. Archived Staff: Archiving and restoring accounts

When a staff member leaves, their account is archived. This means their details are hidden from the bulk of the system but are retained for your records.

There are multiple ways to archive accounts however you must have the associated access permission to do this.

## 4.27.1. Scheduled Archiving

You can set a 'Leaving Date' on individual accounts anytime. This is under their 'Employment Details' tab on their profile page. Setting this date will inform the system to automatically archive their account at the end of their leaving date. It will happen automatically sometime after midnight. The leaving date is their last day.

Once a leaving date is set, no shifts can be scheduled for after the leaving date.

You can also configure automatic archiving under Dashboard > System > Configuration > Global Settings > Data Policies. This allows you to configure various filters to capture inactive staff and automatically remove them from the system.

### 4.27.2. Manual Archiving

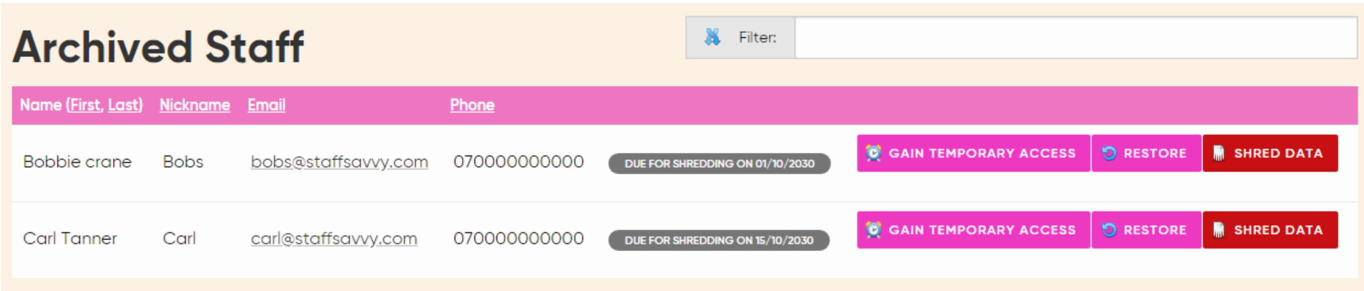
You can manually archive an account from either their profile page or using the Staff > Staff Settings > Manage Staff and clicking Manage on the right side of their name.

When archiving an account, you can choose to transfer any outstanding shifts to another account at the same time. Otherwise they will be converted to extra shifts automatically.

The archive action is performed instantly so the account holder will be informed and access to their account removed.

### 4.27.3. Restoring Accounts

You can view archived accounts under Staff > Staff Settings > Archived Staff. This will provide you with a searchable list of all archived accounts.




The 'Gain Temporary Access' option allows you to temporarily view the staff member's profile and associated data. Temporary access is treated as an active account for billing purposes and granting access will keep the access live for a month before returning to no access.

The restore option will return the account to the main system and restore access for the user. They will be informed of this action.

Shred data will **permanently** delete the account's data. There will be a date that Archived staff data will automatically be shredded if not restored.

### 4.27.4. Notifications

Account holders are automatically informed when their accounts are archived and restored.

You can also configure other email addresses to be informed of upcoming archiving and when an account is actually archived. This is configured under Global Settings > Data Policies.

### 4.27.5. Data Shredding

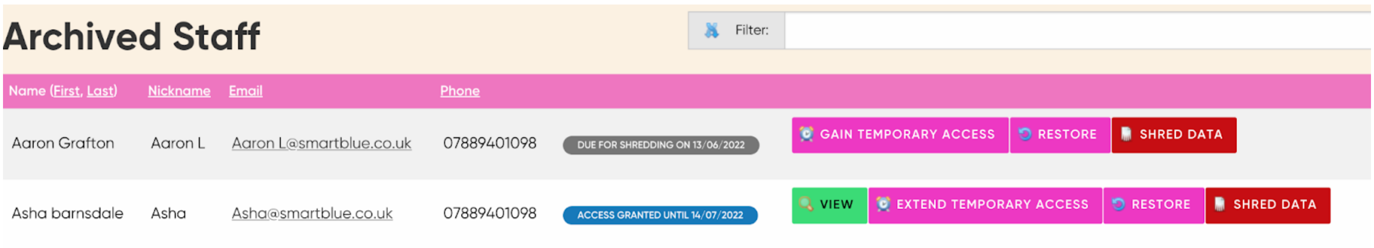
This Is the process where we will delete all personally identifiable data attached to an account. It is not possible to fully restore an account once this has happened. However, certain data could be restored manually on request if still held by our backup systems. This is normally for up to 90 days.

Do not rely on our ability to restore this data once shredded. Shredding should be seen as final.

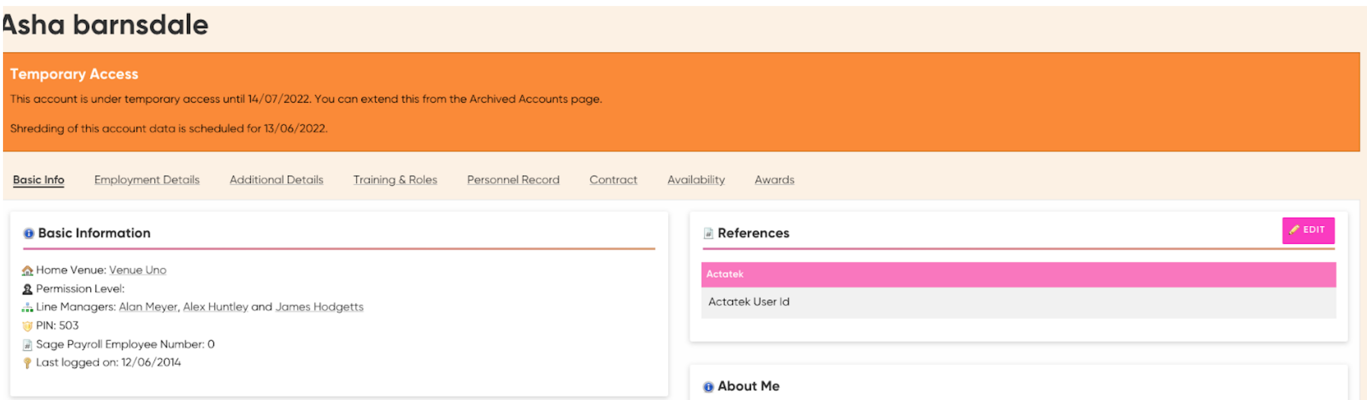
## 4.28. Archived Staff Member Information can be Accessed by Line Manager

When a staff member has been archived but their information has not been shredded, a line manager can still choose to gain temporary access to the account. This allows the line manager to view the information provided on their profile in case it is needed.

Archived staff can be viewed via Staff > Staff Settings > Archived Staff. From here click on ‘Gain Temporary Access’. This will give you access to view the Staff Member’s profile for an additional month before automatically shredding the Archived Staff Member’s data.




Additionally, you can extend the length of time you have access to the archived member by clicking extend temporary access next to the staff member’s name. Alternatively, the Staff Member can be reinstated or have their information shredded.



# 5. 5. Performance and Welfare

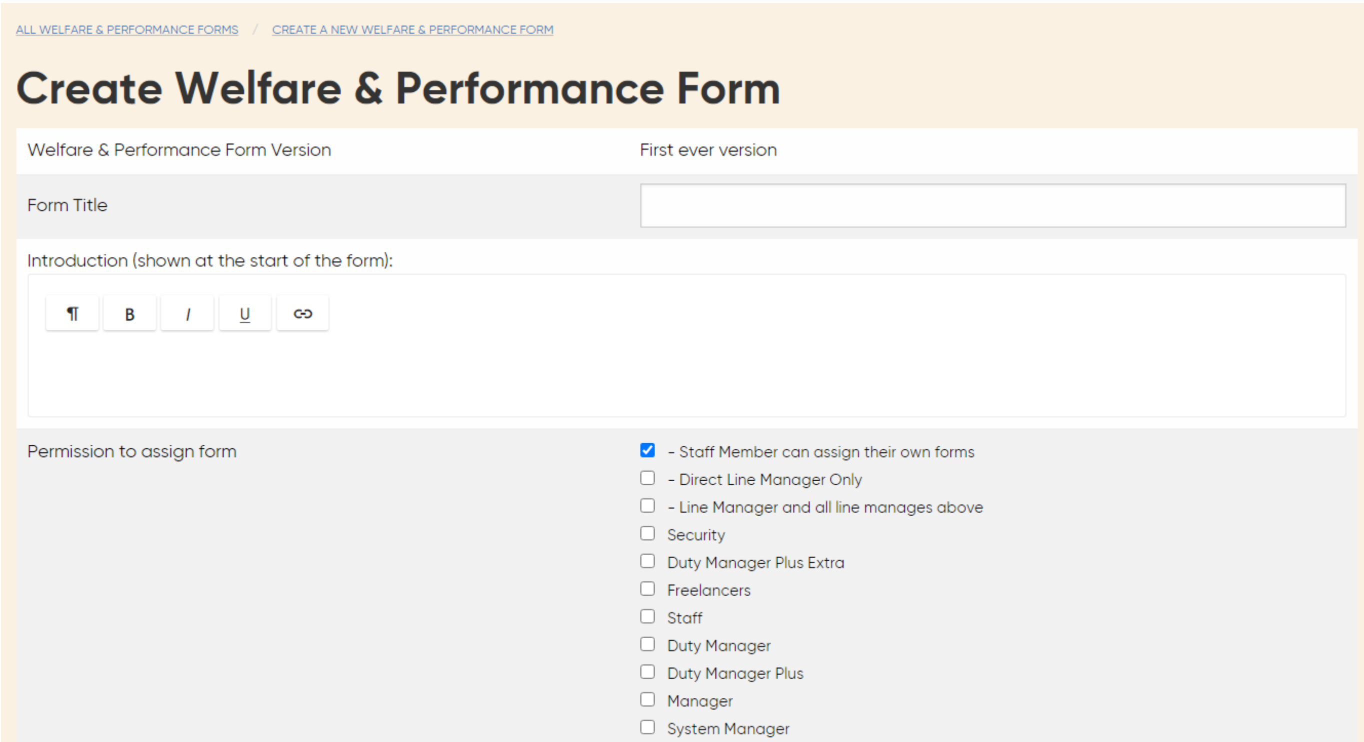
## 5.1. New Performance and Welfare Forms

This exciting new feature allows for multi-step forms to be completed by multiple parties such as HR, line managers and staff members.

The forms are perfect for reviews, one-to-ones, change requests, investigations and more.

To create your first new performance and welfare form, simply go to System > Performance and Welfare > Manage Performance and Welfare Forms. Or just search in the new menu search box for Performance.

Use the create new button from the Actions menu to start your new form.




Here you'll be asked to name the form and provide introduction instructions or explanation of the process for staff who are completing the form.

You can then choose the access levels that can both assign new forms to be completed and then view the completed form. Finally, choose where this form should be displayed; under the Personnel Records tab on a profile or within My Documents. The access permissions apply wherever the form is displayed.

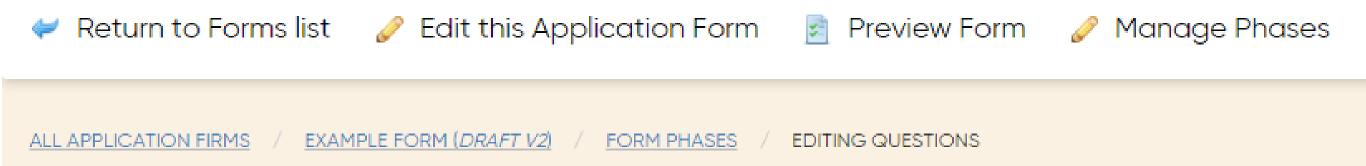
 

### 5.1.1. Phases

The forms use phases to separate out each step of completing the form. Each phase can be completed by a different person; e.g. phase 1 completed by the staff member. Phase 2 by a line manager and phase 3 by a member of another role. This can be edited once a new form has been created.

This is just an example; you can have as many phases as you like with different people completing each phase.

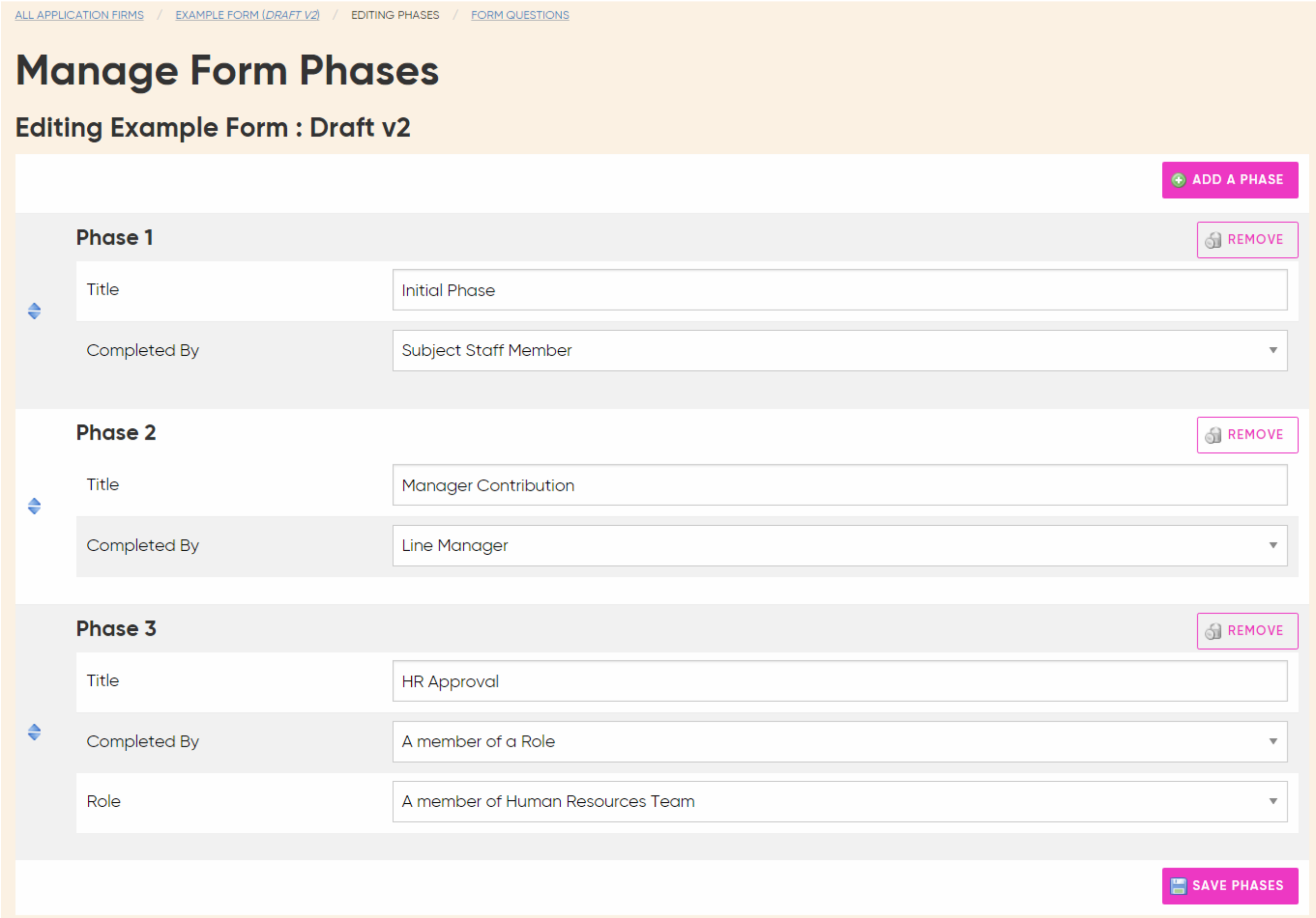
When you first create a form, the system will set up the initial phase for you. From the Manage Welfare and Performance page you can choose to 'Edit Questions' for the new form. At the top of the Editinguestions page, you have access to Manage Phases in the Actions Menu.




On the manage phases page, you have access to add additional phases and manage any you have there already. Every form needs at least one phase.

Below are the phases for the example above; staff member first, then line managers and finally the HR team sign off.

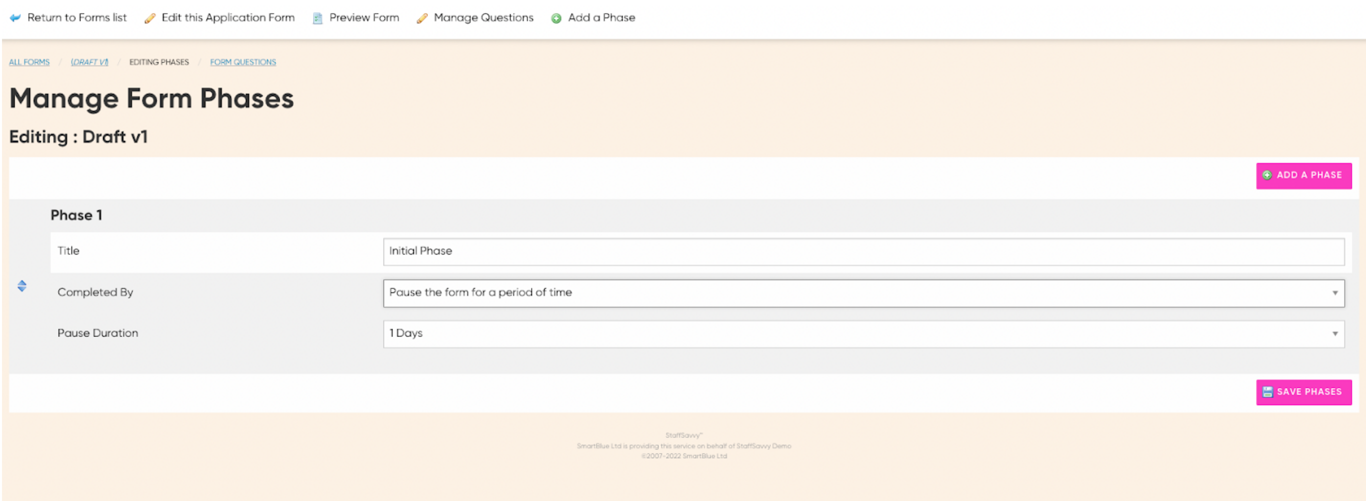
 




You can use the blue order arrows on the left to arrange the phases. Once you are happy with the phases, use the Manage Questions button in the Actions menu to return to the form's questions.

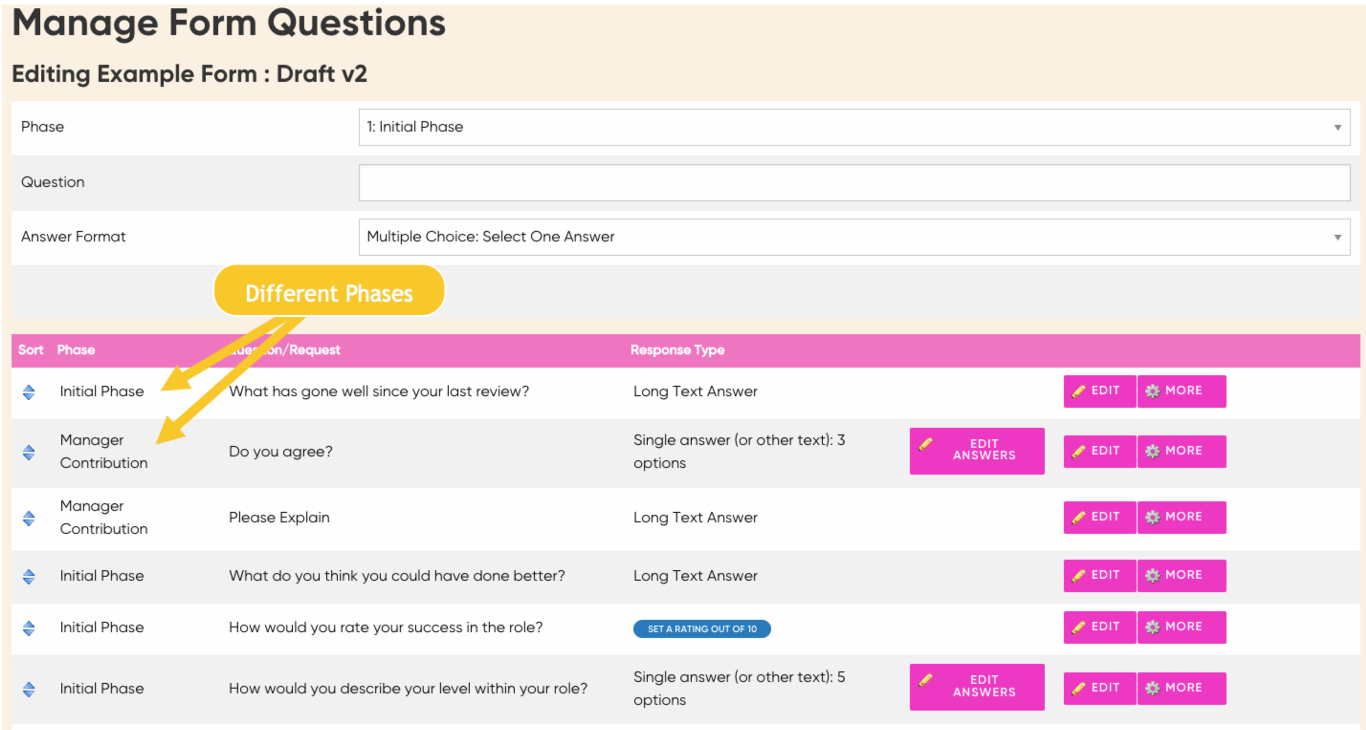
In addition to a phase that is assigned to a person or role to complete, you can also have paused phases. This is when the system will wait a set period of time before automatically moving the form to the next phase. This is useful for forms like review periods where you need to wait a period of time before completing parts of the form.

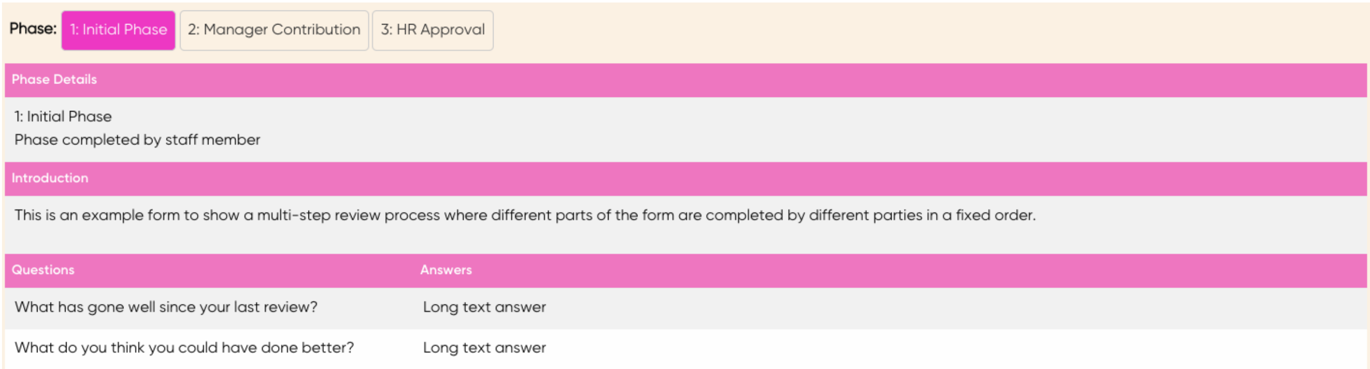



As per the other form builders within StaffSavvy, the 'Add Question' section is first. Within here you can choose the phase to assign questions to, enter the question title and choose the answer format.

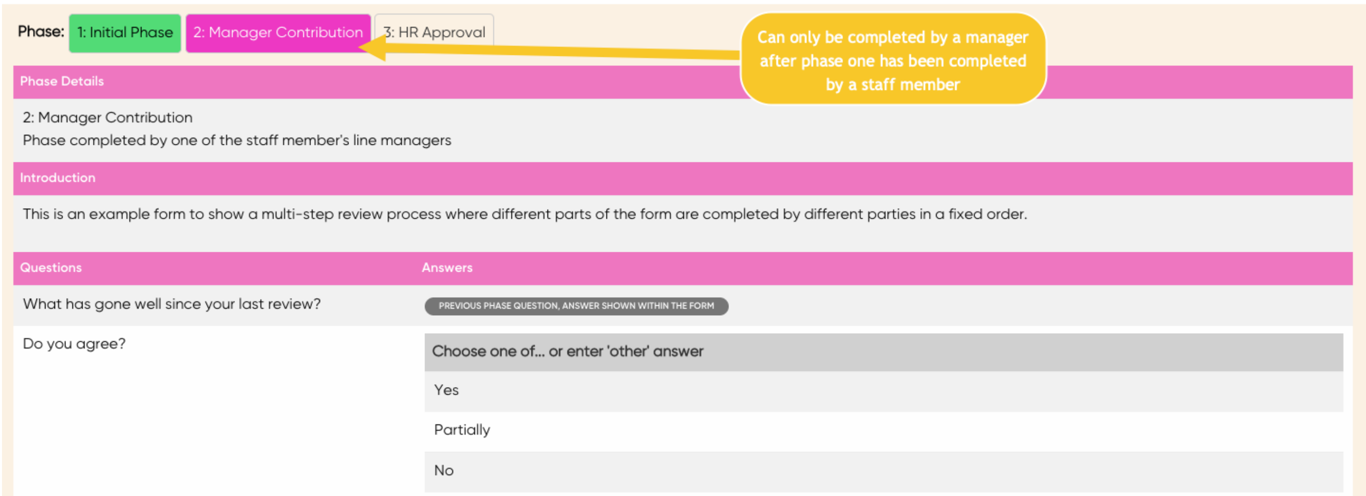
Below the new question box are all of the existing questions.






**How the initial phase will appear.*




As per the example, you can mix and match the order of the questions with the phases. So in the order I have two different phases together at the top. This is purely for display purposes, not the order they will appear in until all phases are revealed. This allows for follow up questions to remain visually tied together with the relevant questions from the initial phase and will determine how the form will be ordered once all phases are revealed. Only after all Phase 1 answers are completed, will any subsequent phases be revealed until they are ready to be completed.

So in the example above, the form is getting staff member feedback first. Then it will ask a manager to comment on that feedback. The manager's feedback will be displayed just below the staff member's comments.

### 5.1.2. Question Types & Publishing

You have the usual answer formats available such as text and multiple choice. You also have ratings (e.g. 0 to 10) and signatures (when the person completing the form can sign their part of it).

By default questions are all required. You can use the options under each question to change it to be optional under the cog icon on the right of the screen..

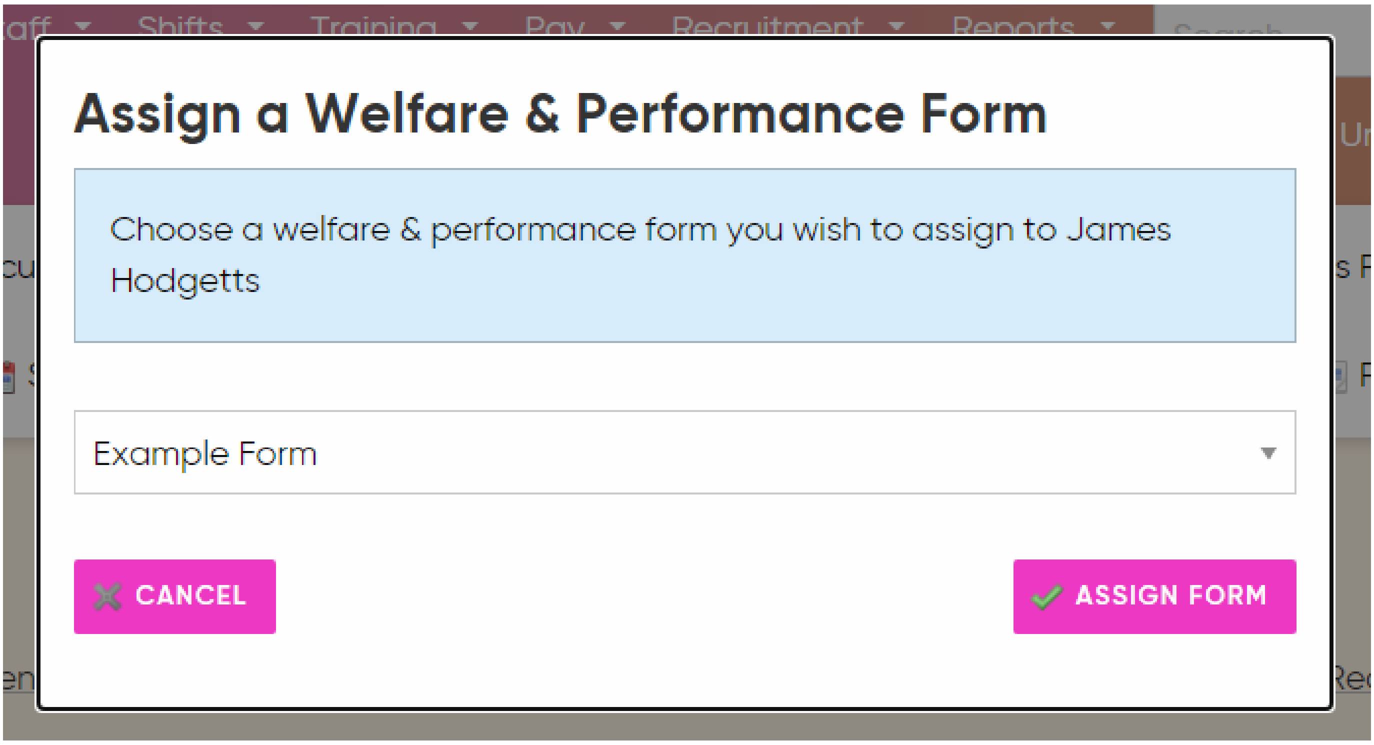
 

As per other form builders, this form is version controlled so changes to the questions require a new version. Once you have completed your initial version, you must publish it to be able to use it.

Go to the forms overview page where you can see a list of all forms to publish this version.

### 5.1.3. Assigning forms to be completed

You can manually assign forms to be completed under each staff member's profile. Choose Documents > Assign Performance & Welfare form.




This will notify them to complete it and display the notification on their dashboard.

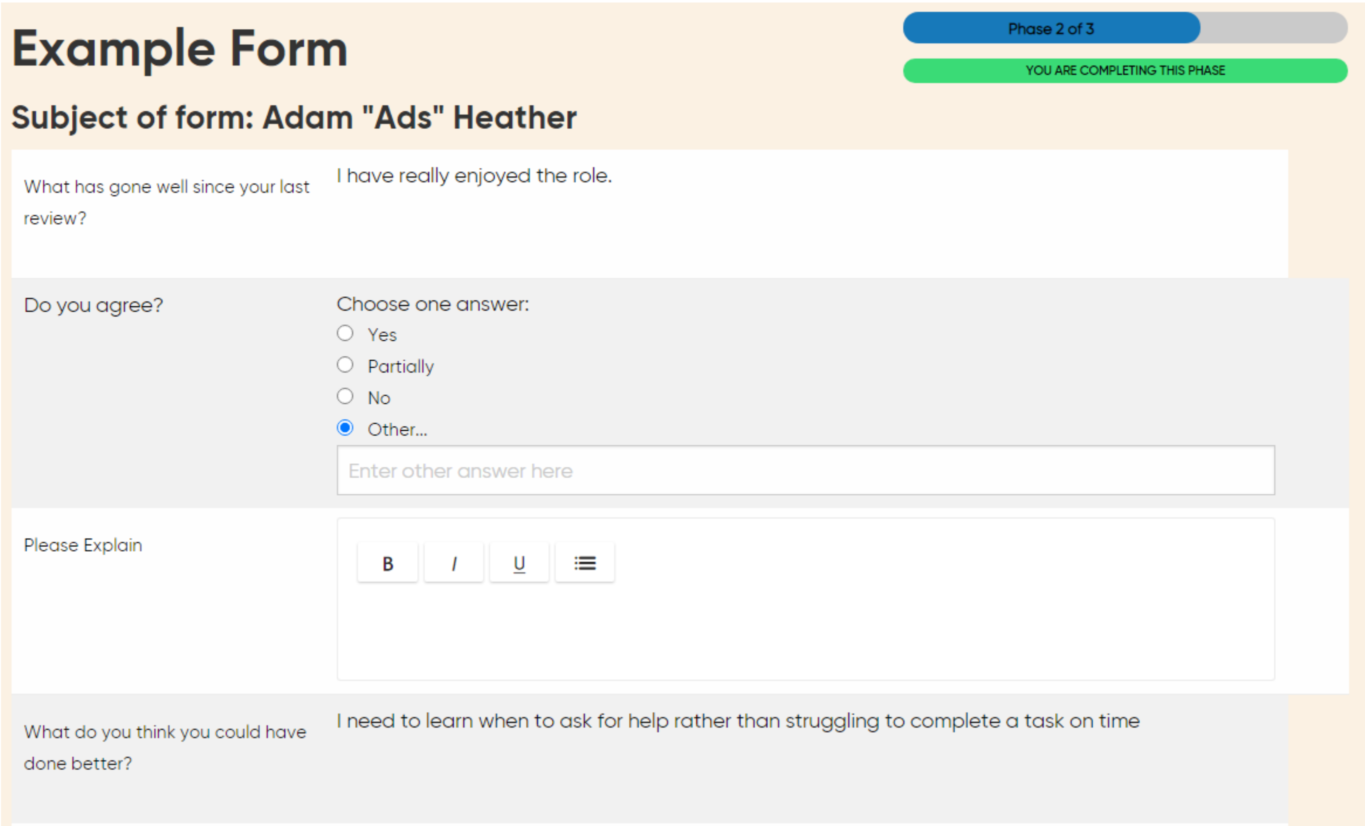
You can also assign forms using triggers; so forms can be assigned after X days or X shifts.
We'll be adding further scheduling options for these forms along with check-in forms in a future release.

### 5.1.4. Completing the forms

Staff will see a link displayed at the top of their dashboard to complete their portions of the form. For managers, it will be displayed within the notification area.

When completing the form, the system will display the questions from the current phase alongside the answers from any previous phases.




The phases and status is shown in the top right of the page,

### 5.1.5. Viewing the Full Form

If desired, you can show all parts of a form to a staff member. This allows them to see all of the questions all parties will complete as part of the form.

By default, you can only see the questions for the phase you are completing.

Choose this option under the settings for the form.

### 5.1.6. Follow Up Forms

You can configure follow up forms within the form general settings. This can either pre-set a follow up form to be completed after a fixed period of time or you can choose several options the manager can choose between when completing the form.

This allows managers to choose what the next step will be once a form is completed. For example, at the end of a probation period, you might offer the manager a choice between completing an extended probation form next or a regular review.

These options allow you to create automated workflows.

### 5.1.7. Deleting and Sending Back Forms

Managers are able to delete partially or completed forms from a staff member by viewing the form under their profile page. The delete option will appear in the actions menu. Staff cannot remove their own forms.

The staff member(s) assigned to complete the current phase has the option to send the form back to the previous phase (and the staff member(s) previously assigned for the form). This allows a form to be sent backwards to have changes made.

### 5.1.8. Viewing the forms

You can access all of a staff member's forms via their profile page. Either in the Personnel Records section or under their Documents page.

Forms can be downloaded as a PDF too. The system will format up the details of the form at the top of the page along with all of the answers.

StaffSavvy

# Example Form

**Harry Summers**

StaffSavvy Demonstration

## Details

| | |
|---|---|
| Staff Member | Harry Summers |
| Requested | 9:30pm 13/12/2020 |
| Completed | 9:52pm 13/12/2020 |
| Parties involved | Harry Summers<br>James Hodgetts<br>Sam howes |

## Form

| | |
|---|---|
| What has gone well since your last review? | Pretty much nothing - I thought I could do the job but I am really struggling. I feel really lost and deflated. |
| Do you agree?<br>*By James Hodgetts* | Partially |
| Please Explain<br>*By James Hodgetts* | Yes, I think this is a good |
| What do you think you could have done better? | Everything. I've really not been able to understand the daily role and there is a severe lack of support |
| How would you rate your success in the role? | 0 out of 10 |
| How would you describe your level within your role? | Lots to learn |
| Do you agree?<br>*By James Hodgetts* | Yes |
| Please Explain<br>*By James Hodgetts* | I think you are doing well with the role so far. It's been a very unique year and our operations have had to adapt drastically. I'm sorry you don't feel you have received enough support; we'll address this immediately. |
| What would you like do achieve before your next review | I would like to receive support and training so that I can make this role a success |
| Review and confirm the targets<br>*By James Hodgetts* | Yes, I think our target should be you confirming you are happy with the support and training received and are able to perform the basic role unsupervised. |

Staff Member Signature

# 5.2. Check in Forms

## 5.2.1. Summary

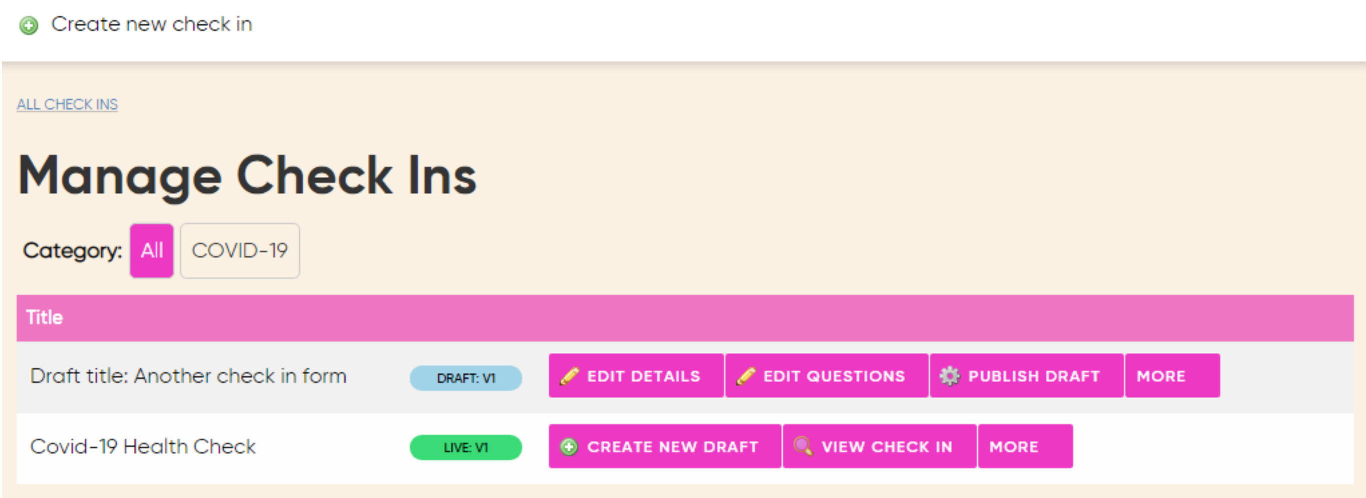
Check in forms are designed as short multi-choice forms that can be completed quickly and often. The results of the forms are not normally communicated.
Answers within the forms can be marked as raising an alarm which can then be used to cancel shifts, create tasks, send emails etc.

It's perfect for quick check-ins to see if there are any concerns from a staff member or to confirm they have the correct safety equipment or no health concerns.

Check in forms can currently be assigned by a trigger or assigned as part of a shift or clock in.

## 5.2.2. Creating and managing Forms

Check in Forms are created and managed under System > Welfare and Performance > Check in Forms.




New forms can be created using the 'Create new Check in' option in the Actions menu. All existing check in forms will be displayed below in the management list.

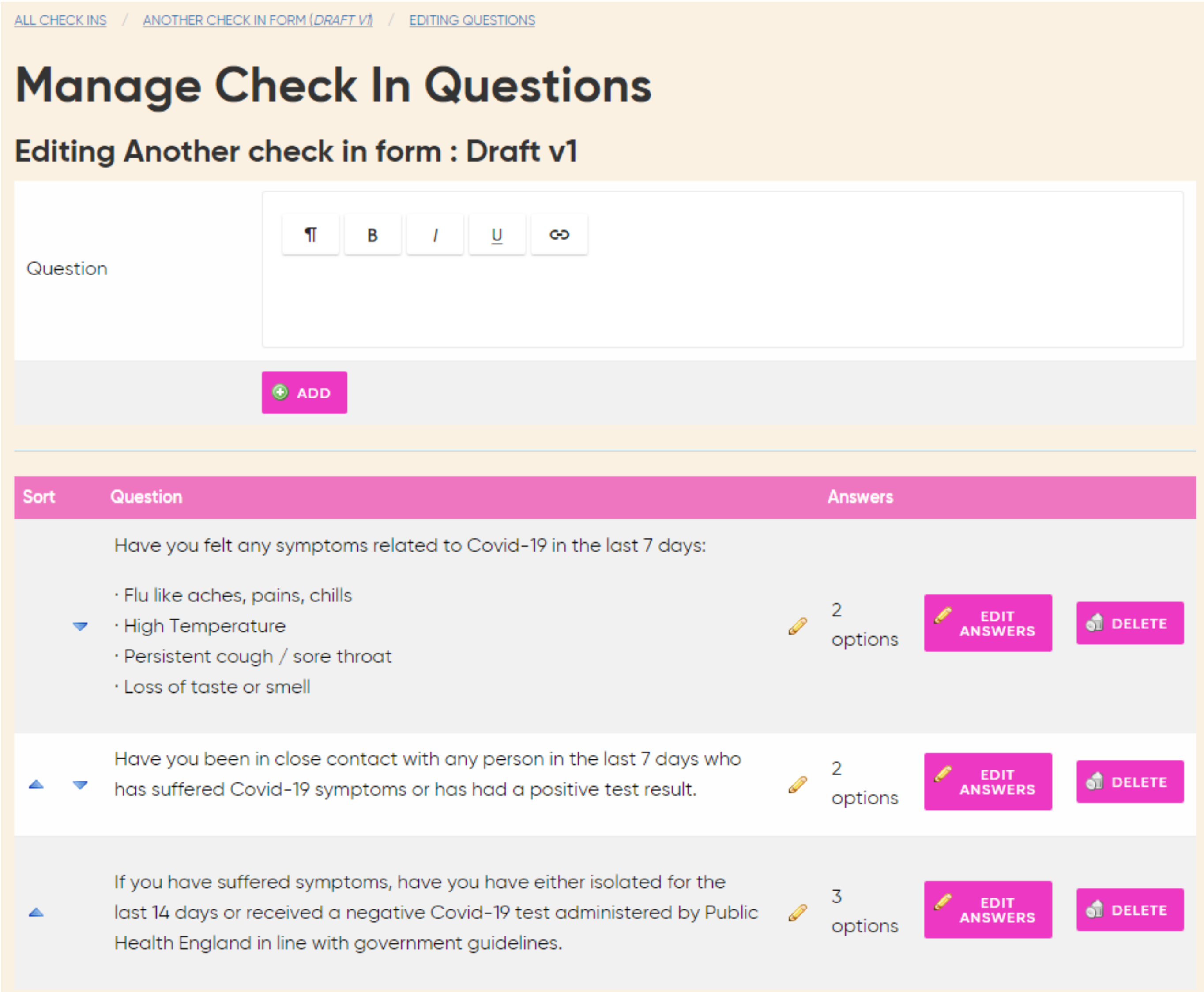
Each form can have a category set that allows you to filter the forms by those categories. In the example above there is a COVID-19 category.

Check in forms are version controlled, just like many of the other forms and tools. This means that to make changes to a form, you need to create a new draft, make your changes and then publish the draft.
Only published forms can be assigned and completed.

For draft check in forms, you have quick access to edit their details (i.e. the current title), the questions, publish the draft and, under the more option, the options to copy, set a category and delete.

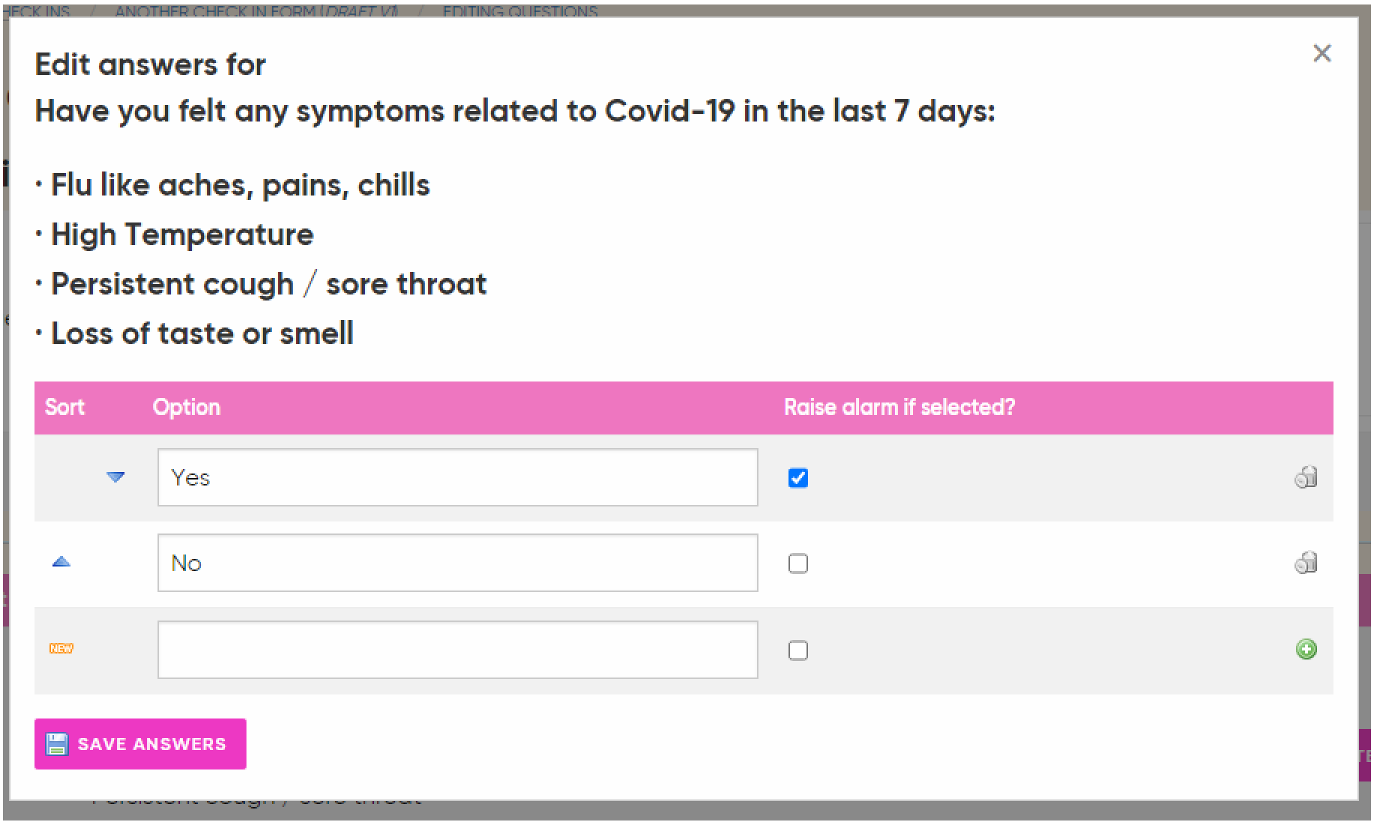
### 5.2.3. Managing Check In Questions




Above is an example of the question management page for check in forms. At the top is the option to add a question; simply enter the question content and click Add.

The questions will be displayed below in the list. Each one can have multiple answers and you can use the blue arrows to re-order the questions.

When editing the answers for a question, you will see a popup similar to this example:




Add each of the options you want to offer the staff member to the list. If you need more options, use the Plus icon to add another row.

The checkbox allows you to raise an alarm if that answer is selected. The alarmed answers can trigger different events and notifications so it allows you to raise alarms on multiple questions or multiple answers. If any of the alarmed answers are chosen then the alarm will be raised.

Once you have completed adding/editing your questions and answers then don't forget to publish the draft so that it becomes live and in use.

### 5.2.4. Assigning Forms

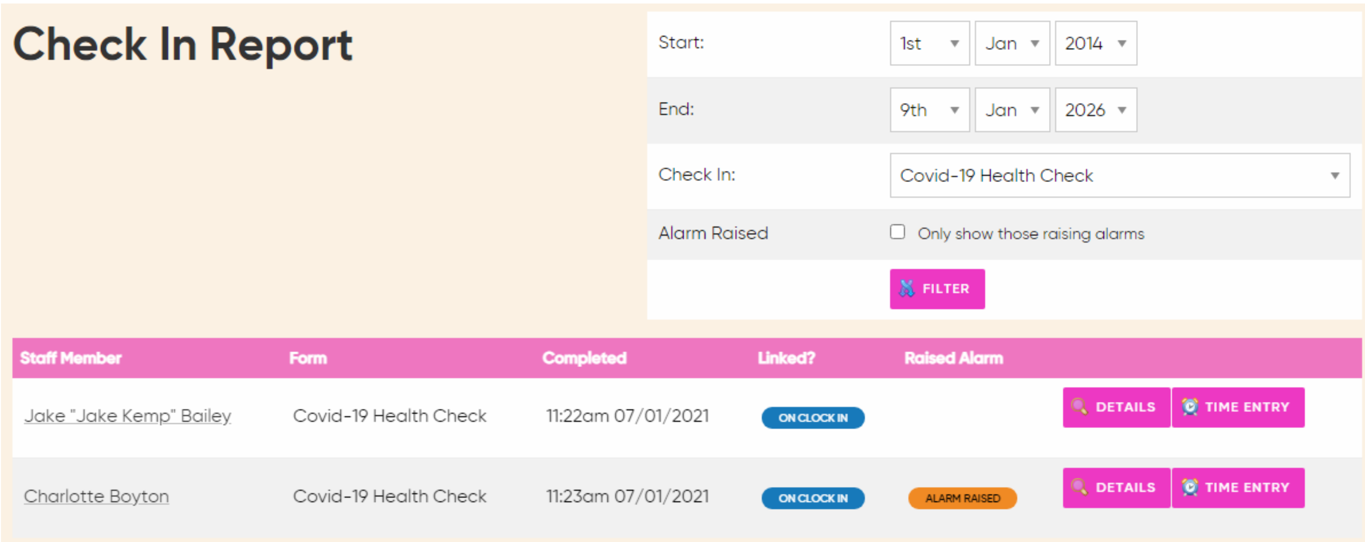
Check in forms are designed to be assigned automatically; there isn't currently a manual option to assign a form to a staff member.

- **Assign on an upcoming shift**
  Setup the check in forms on a venue's 'Shift Configuration' tab under Check-In. This allows you to set how many hours before the shift the form should be requested and what happens if the staff member triggers an alarm when answering the form.
- **Assign on clock in**
  Setup the check in forms on a venue's clock-in configuration tab. This allows you to set what should happen if they trigger an alarm when completing the form.

- **Assign on clock out**
  Setup the check in forms on a venue's clock-in configuration tab. This allows you to set what should happen if they trigger an alarm when completing the form. The form will be displayed once a day when a staff member clocks out of their shift.
- **Assign using a trigger**
  Assigning a check in form can be set within a trigger. This can be managed via System > Manage Triggers. This allows you to assign a form after X days of being employed, X shifts worked or when other events happen.

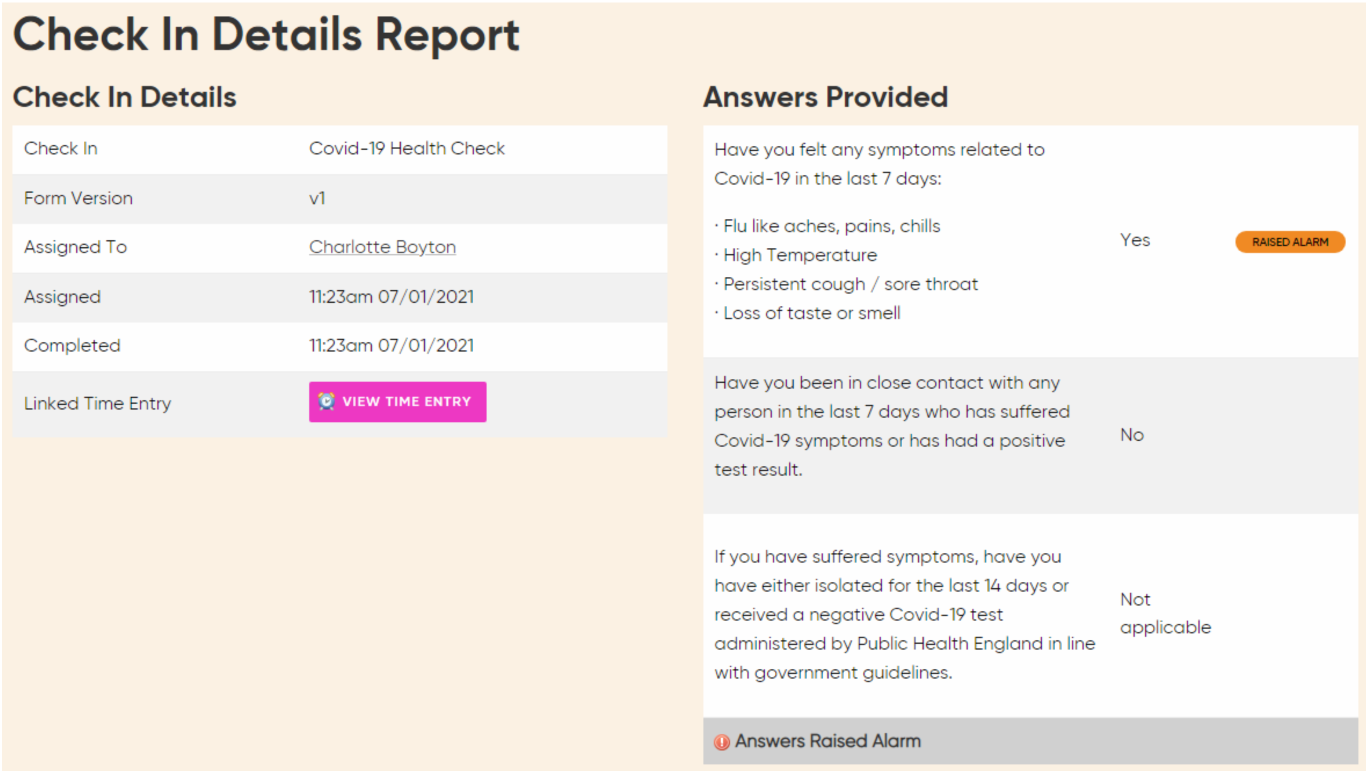
### 5.2.5. Reporting on Check In Forms

You can report on all completed forms or view those completed by a staff member.
To view all forms simply go to Reports > Performance and Welfare > Check In Reports.




Here you will be able to filter the dates and forms at the top as well as only viewing the forms that have raised alarms.

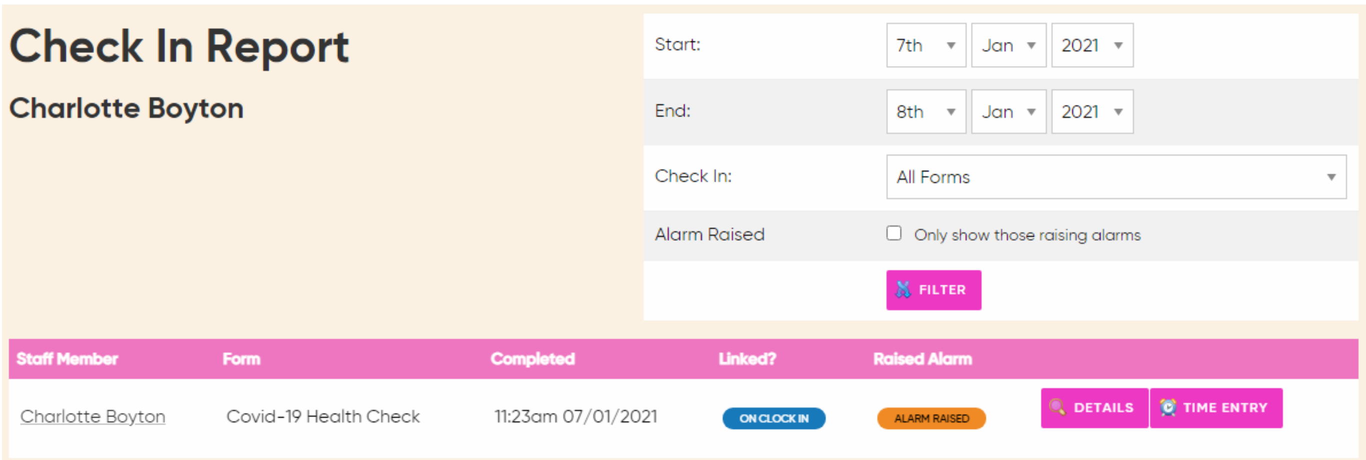
Viewing the details page will display further information including all answers provided:




If the check in was linked to a shift or time entry then the linked details will be shown. The check in details will also be shown on the time entry or shift details page so the information can be easily accessed.

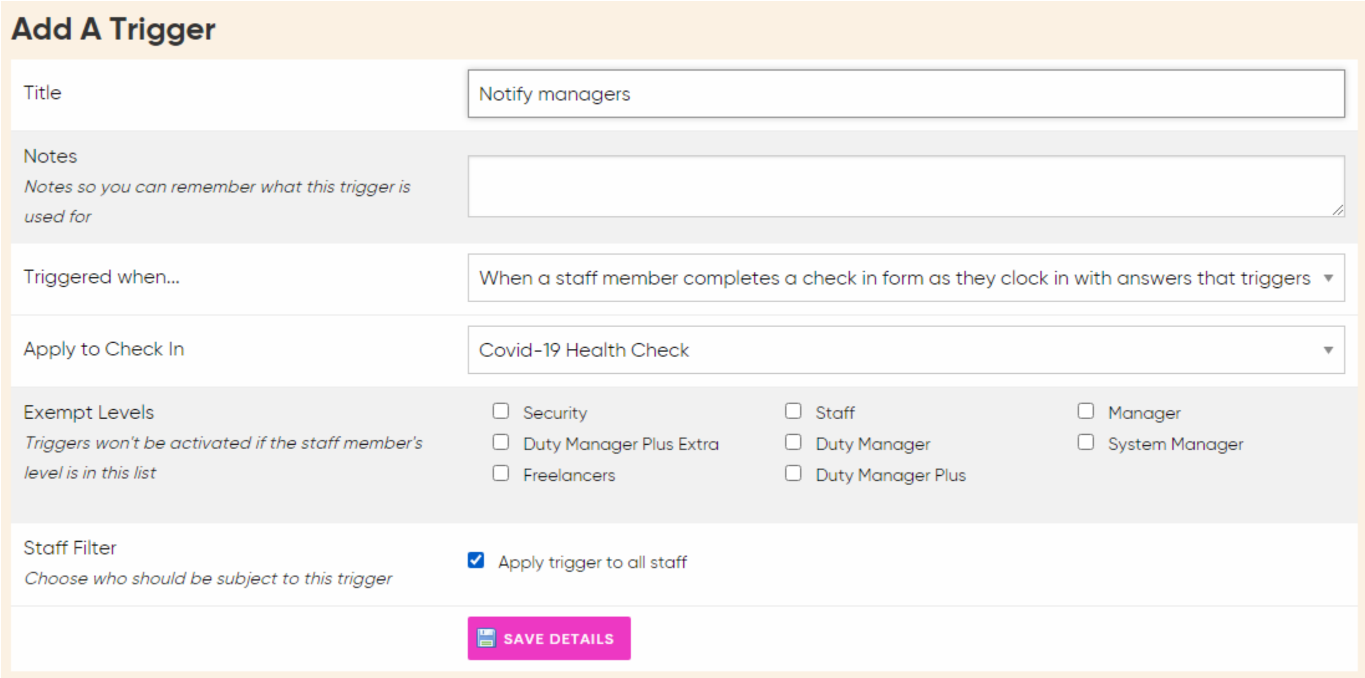
To view all of the check in forms completed by a staff member, use the Check In Report button under their Reports action menu on their profile page.

Here you will see all of their completed forms and you can filter by form, date range and whether they raised an alarm.



### 5.2.6. Alarms and Notifications using Triggers

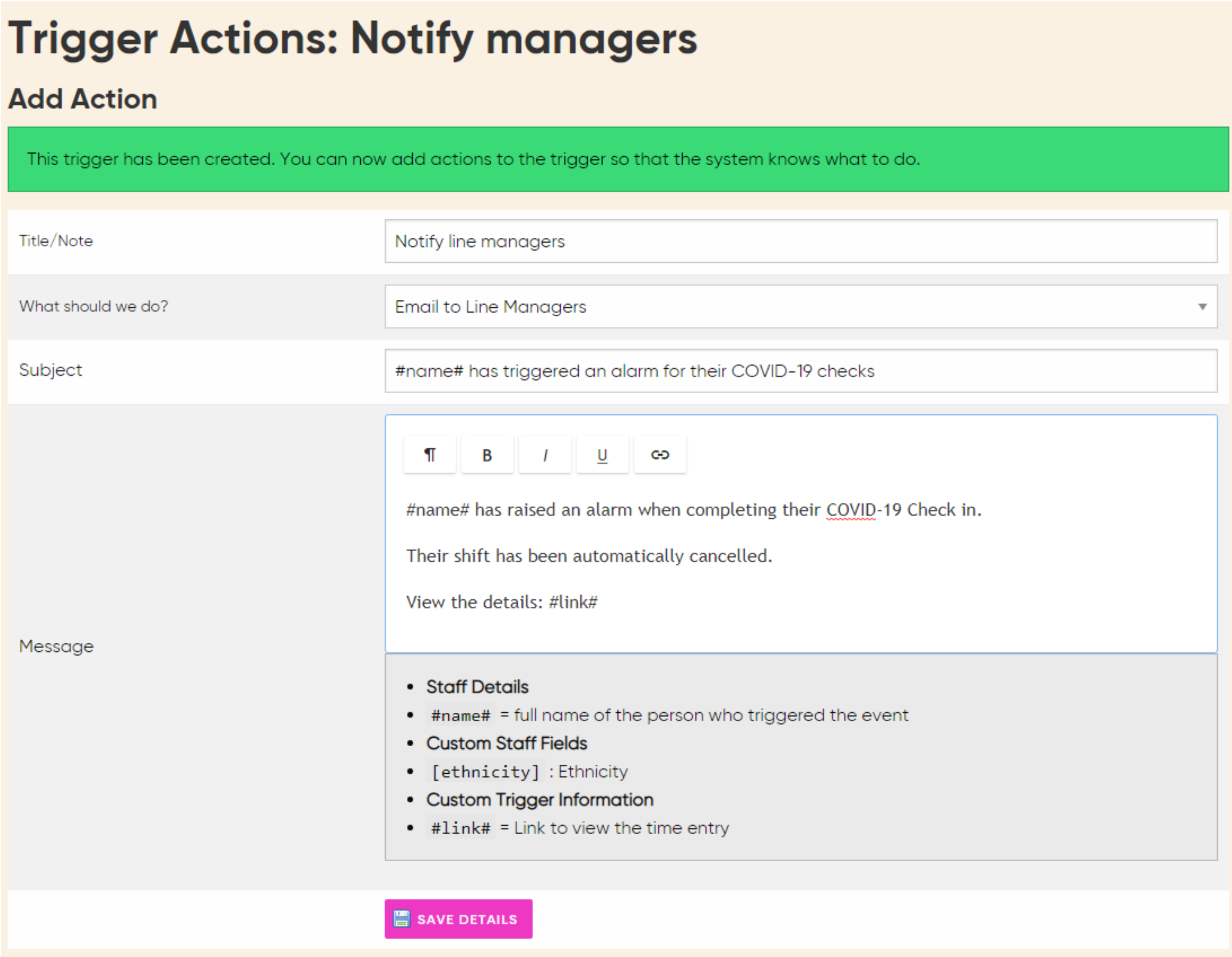
By default the Check In forms won't send notification emails or alerts. These can however be configured using our Triggers feature.
Under System > Manage Triggers use the option at the top to Create a new trigger.




Add a title and some notes so you can keep track of what each trigger does, i.e. 'In the Trigger When...' drop down, choose one of the options under the Check In title; one is triggered when a form is completed for a shift and the other when a form is completed for a time entry. You will need to add two triggers if you want notifications to be sent for both events.

Choose the check in form you want to create the alerts for and set any exemptions or filters as needed. Once saved, you will be asked to add an action.

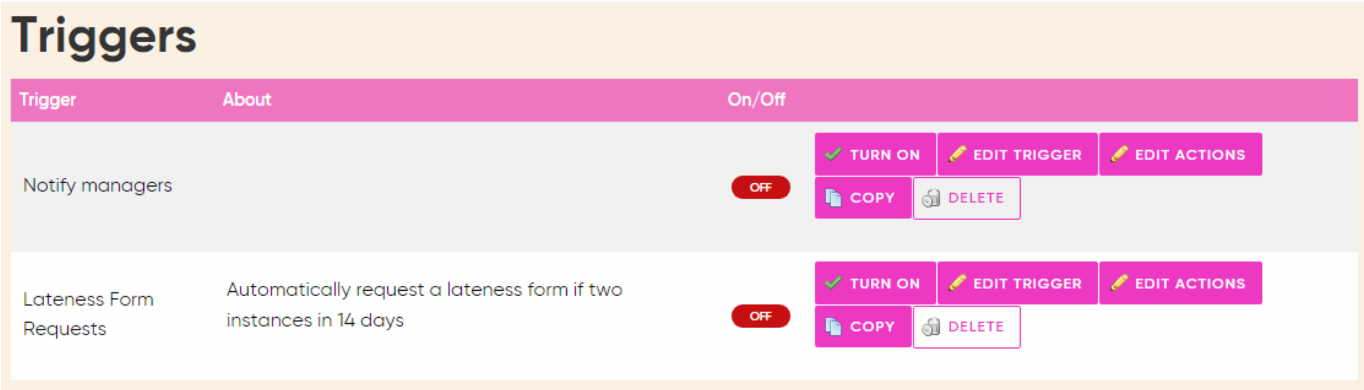
The actions are what the system will do when the form has been completed and raised an alarm. The most common is an email to line managers.




In the title/note field, enter what this action will do so you can keep track if you want the system to do multiple emails or actions. In the “What should we do?” Drop down, choose the option for you (e.g. Email to Line Managers).

Complete the Subject and Message boxes. You can use the mail merge tags displayed at the bottom. For example #name# to include the staff member’s name and link to their profile.

Click Save. Once created, you will need to turn on the trigger. View the list of triggers and click the Turn on button to enable this trigger.




Lots of other combinations and options are available on the triggers so you can create multiple emails, tasks and other actions when an alarm is raised.

## 5.3. Goals

Goals can be enabled in your System > Configuration > Global Settings > Features tab.

Each staff member can then have goals added to their account; these can be connected to one of the standard StaffSavvy features; training programs, training certificates, awards and roles.

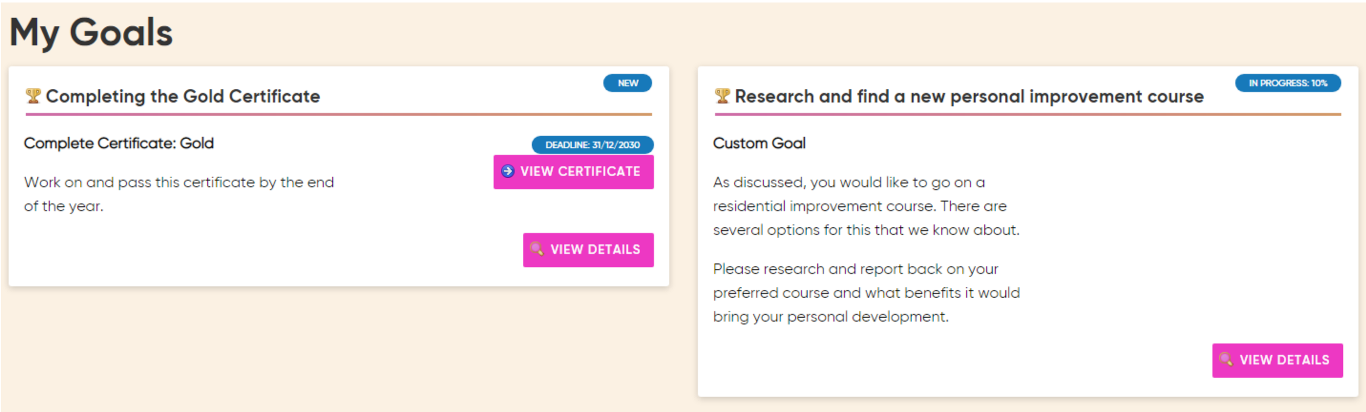
You can also add a custom goal that is not linked to another StaffSavvy item and this can record completion for any task.

### 5.3.1. Creating a Goal

A Goal can only be added by a Line Manager for the staff that he is an active Line Manager for. This can be added by a Line Manager by navigating to their own profile under Basic Info and clicking the staff members that they manage.

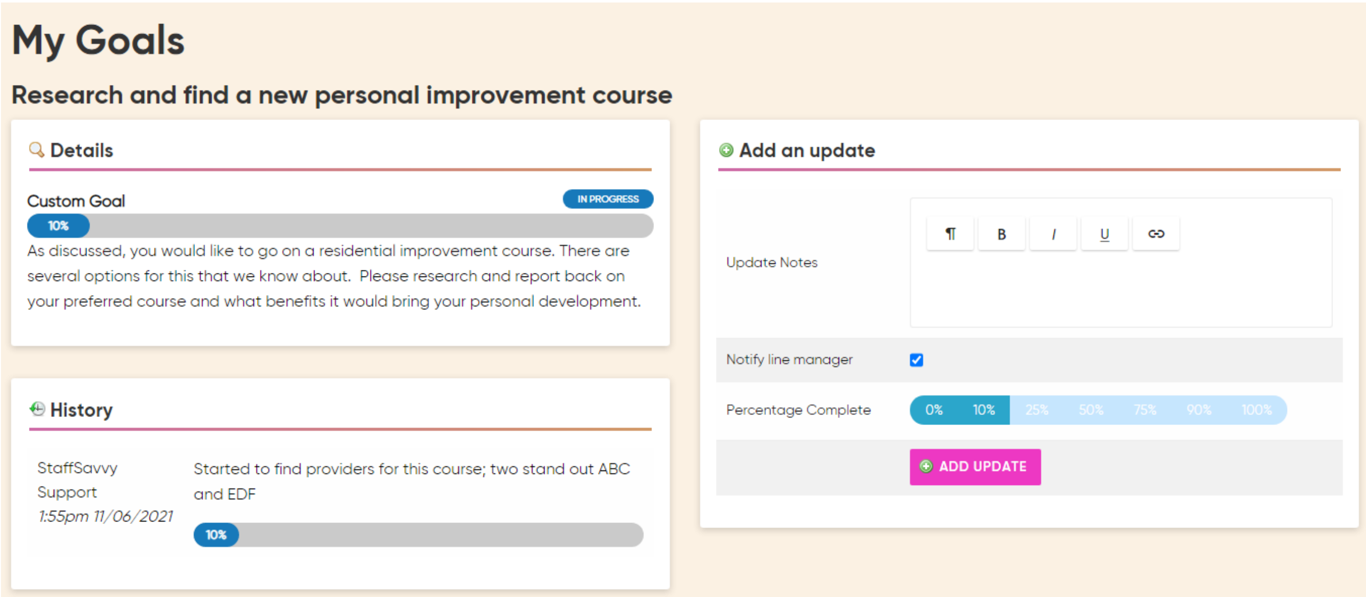
From here you can click on the staff member you want to add a goal for under their profile.




For the linked goals, the system will automatically track the goal and will mark it complete once the other item is complete too. So when a training certificate is passed, the goal will update to be marked as completed.

All goals can have status updates and notes assigned to them by staff members or managers so a record of progress can be kept. Custom goals can also have a percentage completed to show how they are progressing.




### 5.3.2. Goal Details & Progress

All goals have a dedicated page where you can view the latest status of that goal and any updates to the goal itself. Updates can be automatically notified through to the staff member or line manager depending on who is adding the comment.

Once a staff member marks a goal as complete, it will remain on their list until a manager confirms completion. A complete history of goals is available via the staff member’s profile.

Goals can also be integrated directly into performance and welfare forms so that their previous status is saved and any updates made during editing the form are also stored. This is perfect for reviews, 1-2-1's, appraisals and probation reviews.

# 6. Shifts

## 6.1. Understanding Shifts

In StaffSavvy a shift is the plan for a single person working between two set times on a set day with a set skill or role. It is a single instance of someone working rather than a “shift pattern” or someone working the same times each week.

All shifts are independent of each other and there are no limits to how many shifts there can be on a single day or how many shifts a single person can do in a 24 hour period. You can set limits on hours worked to ensure staff don’t work too much.

There are several ways to create shifts within StaffSavvy:

- **Create a Single Shift**
  As the title suggests, this option allows you to create single shifts quickly. This can be done from the Dashboard > Shifts > Create > Create Single Shift. Then simply enter the times you want the shift to be and choose either a staff member or create an unassigned/extra shift for staff to take as they want.
- **Shift Week View**
  This page offers an easy way for smaller teams to manage when staff are working. It lists all staff based at the venue and shifts can be added using the green plus icons.
  The Viewing button, just above the staff names on the left, also allows the page to be swapped to an Excel-style page when you go into ‘Quick Edit’ where you can simply type in the shift times for each staff member.
- **Repeating Regular Shifts**
  This is accessed via each staff member’s profile page on the Actions menu under Shift Management where you can add repeating regular shifts. The regular shifts are automatically created months in advance on an account. The shifts then form the basis of holiday requests (the site knows how many hours will be affected by any single request) and can be used for automatic sick pay too.
- **Schedule Creation Tool**
  This is the method of choice for most large teams or venues with irregular shift patterns. The tool allows templates of shifts to be assigned to a given day and it will automatically assign shifts out to staff based on their availability and skills. The tool can also take staff requirements (two baristas from 6am to 11pm for example) and create shorter shifts around availability to fill the overall requirement.

## 6.2. Available Shifts

“Available Shifts” displays a list of shifts that you are able to take due to your role and skill set. This list displays

- The date of the shift
- Any tasks that are set to be completed
- Start and end times

- The role
- Who is requesting cover (or whether it is an extra shift available)
- The venue (if you happen to work at multiple venues)
- Whether the shift clashes with your requested holiday or nights/hours off

### 6.2.1. Extra Shifts vs Offered Shifts

Extra shifts are first come, first serve. You can put restrictions on how many extra shifts staff members can take but there is no manual control over who takes each shift as long as they can work at that venue and have the right roles assigned. They must also meet all of their contract requirements/limits.

To take or accept a shift, a staff member must click the “Take” button in the final column. This will now be added to their main shift list.

‘Offered’ shifts allows staff to show interest in the shift. A manager can then assign the shift to one of those staff members.

To offer to work, a staff member can click the Offer button and confirm they are happy to work that shift if chosen.

Staff can only take/offer to work a shift if it is for a skill that they have assigned to them and it does not break any of the rules setup for taking shifts or on their assigned contract. For example, they can’t take a shift if they are already working or if it will breach their working hours limits etc.

### 6.2.2. My Shifts alongside Available Shifts

Staff can toggle viewing their own shifts alongside the available shifts on the available shifts page. This option is at the top in the actions menu.

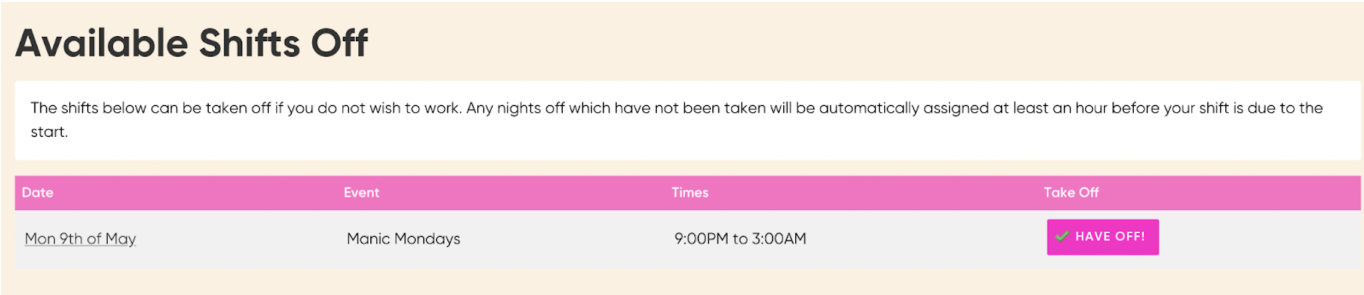
It allows staff to see the shifts they have already committed to when viewing other shifts they might wish to work.

## 6.3. Nights Off/Shifts Off

Managers can create shifts off for certain dates. This is navigated via Dashboard > Shifts > Create > Create Shifts Off. This process can also force staff automatically to take these shifts off if required.

A staff member will be able to see any available shifts that they are able to take off. These will depend on the role, time, and date that no longer need to be filled. This works on a first come, first serve basis. For a staff member to take the shift off (effectively cancelling their shift), they need to click the “Have off!” button. This will then remove them from the shift list and from the calendar.

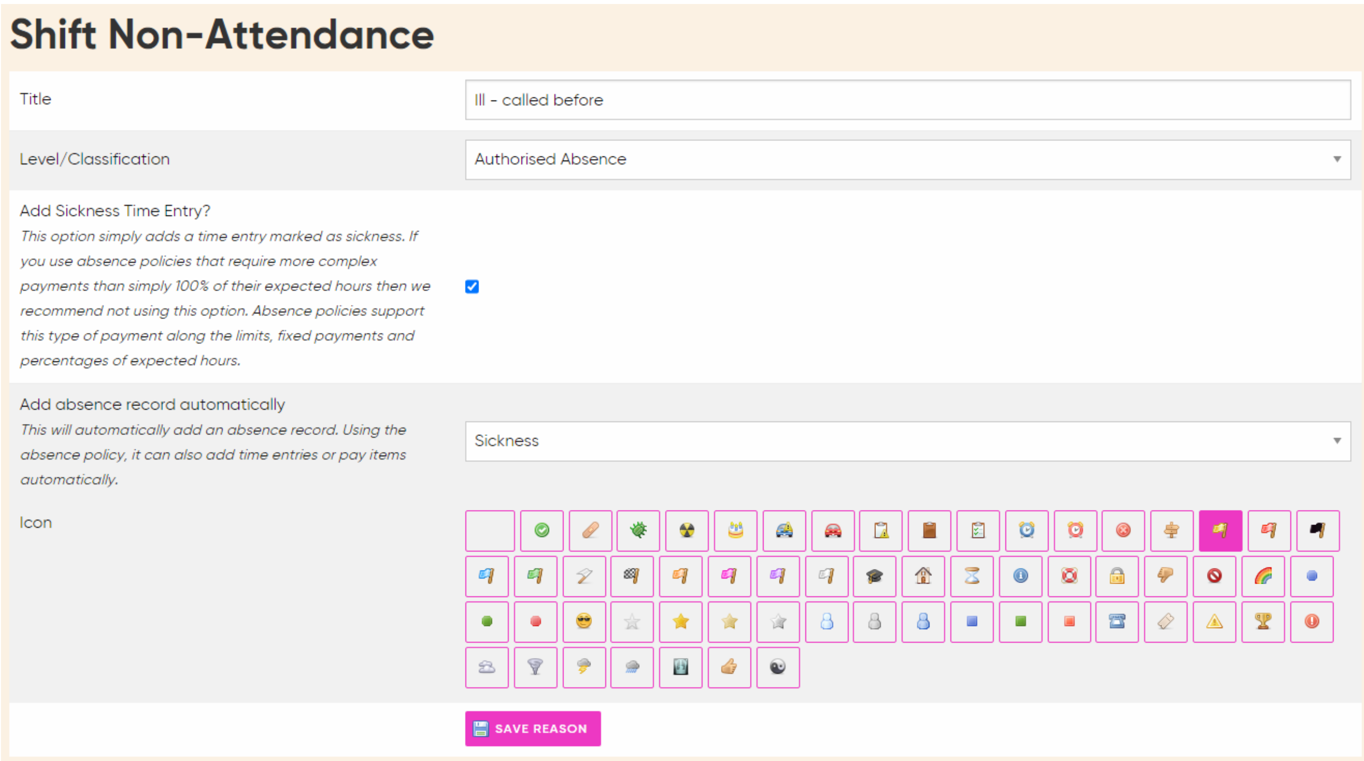



## 6.4. Shift Lateness & Non-Attendance

Shifts have their own lateness and non-attendance reasons. These work alongside the absence policy types but can also be used to record other information (such as lateness or approved early finish).

The options are controlled under System > HR Settings > Non-attendance Reasons.

You can create a non-attendance reason by clicking the ‘Create Attendance Reason’ in the Actions bar. For each reason, you can enter a title, the level (e.g. how severe the non-attendance was) along with choosing an icon.



### 6.4.1. Non-Attendance Payments

When a shift is flagged as non-attendance, the system can automatically add a 'sickness' or 'suspended' time entry for payment. This will match the planned shift and will go through to be authorised as normal.

This is a very quick and basic way to pay all shifts marked as non-attendance due to sickness.

If you require more comprehensive management of sick payments, disable the Add Sickness Time Entry option and use the Add absence record automatically option on its own.

This option automatically links up different non-attendance reasons with your absence policies and ensures that the system will automatically add an absence entry when a staff member is set to be absent from a shift.

In the drop down, simply select the type of absence that matches that non-attendance reason.

## 6.5. Shift Tasks

Shift Tasks allow managers to assign a note to a shift for staff to know what they will be doing to exactly where they will be working within a venue.

Tasks do not limit who can work a shift; they are simply a note.

You can add and edit tasks under Shifts > Shift Settings > Tasks.

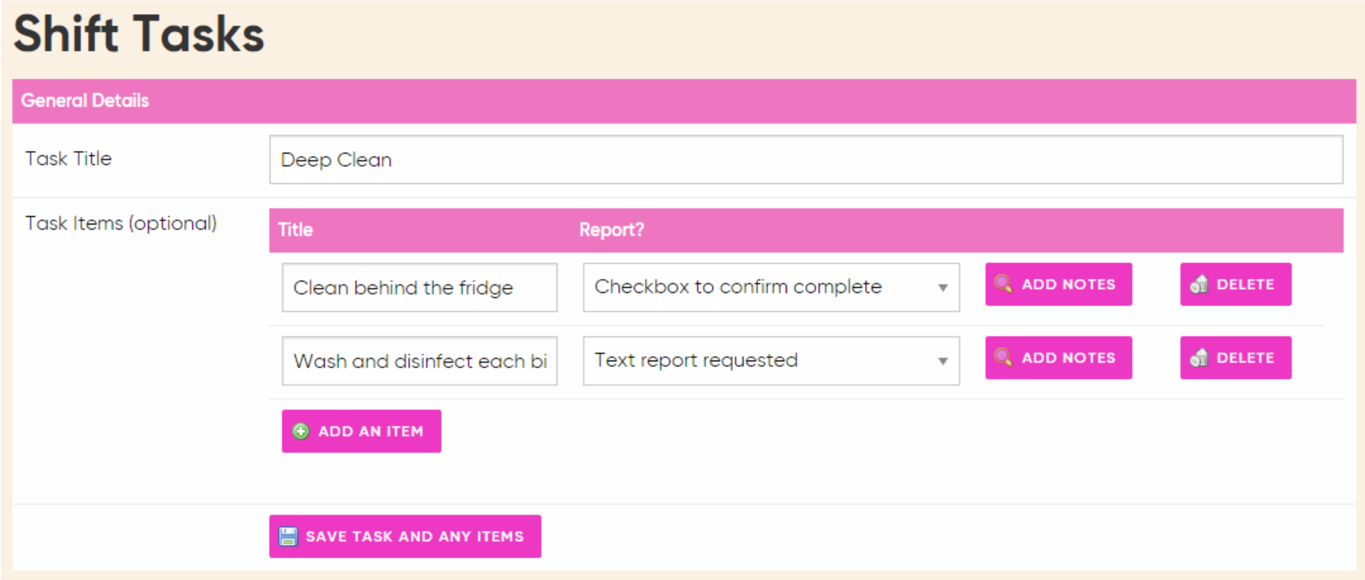
### 6.5.1. Checklists

If required, you can add items to be completed as part of this task.

Staff will be shown that list on the shift details page and the manager can specify if they should confirm completion of each task and if there should be a notes section on any feedback from the staff member to the manager, e.g. "machine inspected, requires new handle".

To set these up simply edit the task. You'll see an 'Add an Item' button. This will add a row as per the layout below. Add as many items as you like, add titles, choose the report type and order them by dragging the blue icons. When happy, click save.




Note: once reports have been received for a task item then you will not be able to change the report type.

## 6.6. Manage Shifts

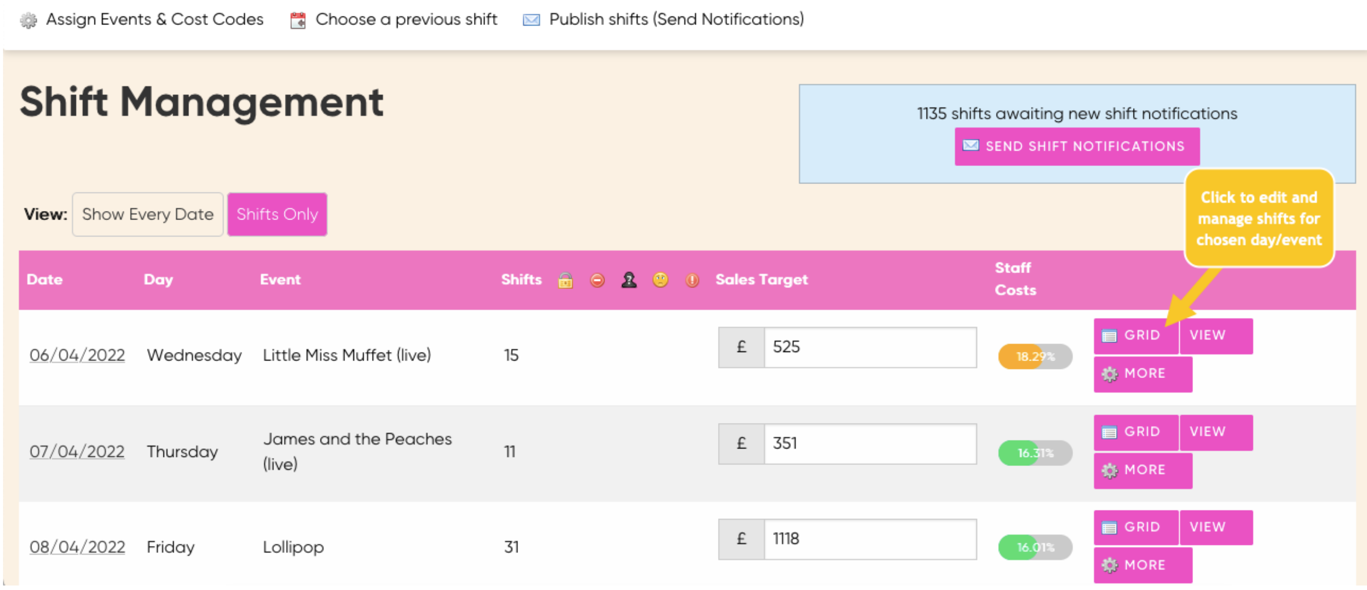
Once a shift has been created you can check for changes or make updates. You can find this by going to your Dashboard and clicking Shifts > Manage Shifts.
The Shift Management page shows

- The date of the shifts that have been created
- How many shifts (how many staff members are working) on that day
- If the shift is locked and cannot be edited
- If the shift is hidden and cannot be seen by all staff
- If there are extra, unassigned or offered shifts that are unfilled.
- If any cover has been requested
- Budget targets
- Budget percentage (either staff cost percentage or percentage of budget depending on the venue settings)

From this page you are able to adjust the shift details by clicking the “Grid” or “Timeline” buttons, as well as print or cancel the entire shift. You can also see all of the relevant cover requests on a given day using the More button.

The print button will produce an easy to view list of staff and times. To print a copy of the timeline view, visit the timeline for the shift and use the Action button to print.




To see previous shifts, go to the left of the Actions menu and select “Choose a previous shift”. This will now display all of the previous shifts. To change back to the upcoming, click the ‘Actions” button again and click “Choose an upcoming shift”.

The previous shifts page will include sales information and total hours per day.

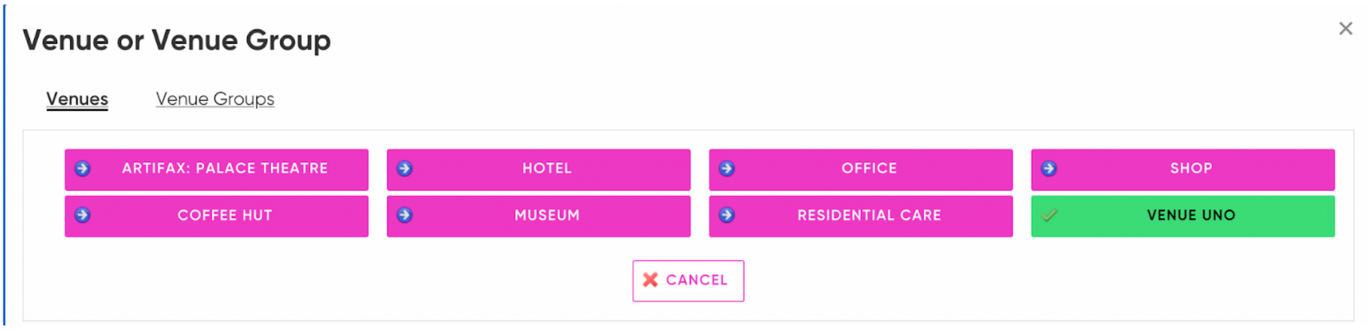
### 6.6.1. Managing Single or Multiple Venues

By default, you will be managing a single venue/outlet. All of the schedule creation and shift management screens can be used when managing a single location or a group of venues.

The groups are called Venue Groups and you can set up as many ops groups as you need and each group can have as many venues in it as needed. See Venue Groups for more information.

To choose which venue or ops group of venues you are editing choose venue groups under the venue selector in the top right.

The popup has two tabs, Venues and Venue Groups. Your currently selected view is in green and you can just click on an option to change views.

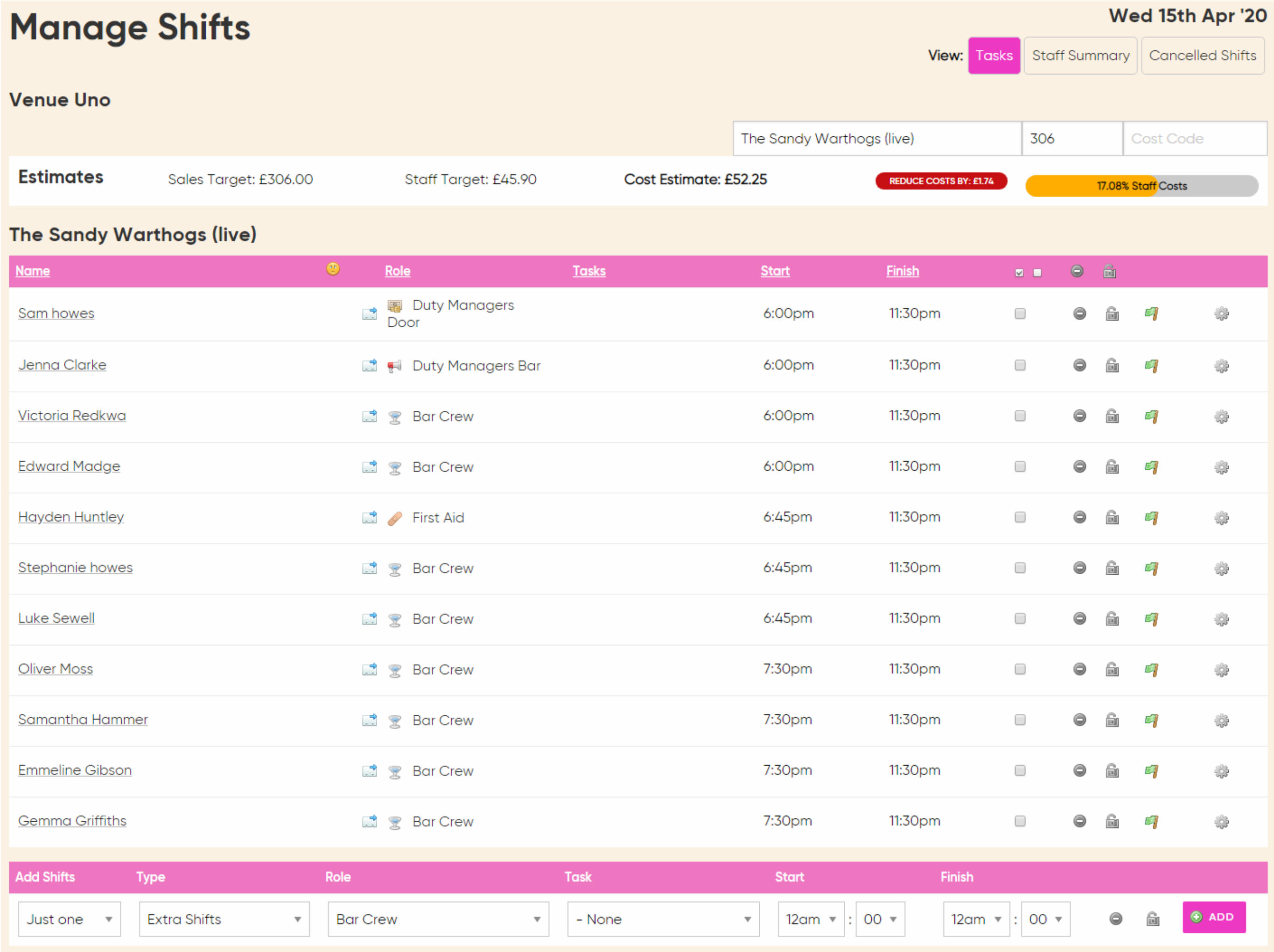



While you can see all venues in a Venue Group, you will still have a venue selected and this will be shown in a lighter blue colour.

Your selection will be remembered between pages and for when you next login so you only need to change this if you want to manage a different combination of venues.

### 6.6.2. Managing Shifts - Grid View

From the Shifts > Manage Shifts page, click the “Grid” button on the right to see details of the shift, such as who is working, their role for the shift, their tasks, and their start and end times.




You can use the transfer icon to the right of the staff member’s name ( ) to transfer the shift to another staff member.

You can also change roles and tasks by clicking on the drop down icons next to the text under role.

You can also bulk update shifts by selecting the shifts shown by the square checkboxes after the start and end times. When selected, options to update the shifts are displayed at the bottom of the page. This includes cancelling shifts in bulk too.

You can also click on the start or end times to select all shifts with the same start or end times. This makes it quick to update all shifts due to start at the same time.

The hidden icon ( ) allows you to toggle the shift between hidden and visible mode. The lock icon enables/disables the locking option ( ). When locked, the shift cannot be transferred by the staff member.

The attendance flags appear after the lock icon, these can be configured within the Settings > HR settings menu option. These attendance flags appear on the staff member's profile. Attendance flags are the only item that can be edited once the shift is complete to allow any incorrect flags to be updated and staff records recalculated.

The cog icon ( ) grants access to edit the details of this shift, view the shift detail page, copy the shift (as extra shift or unassigned) and to cancel the shift completely.

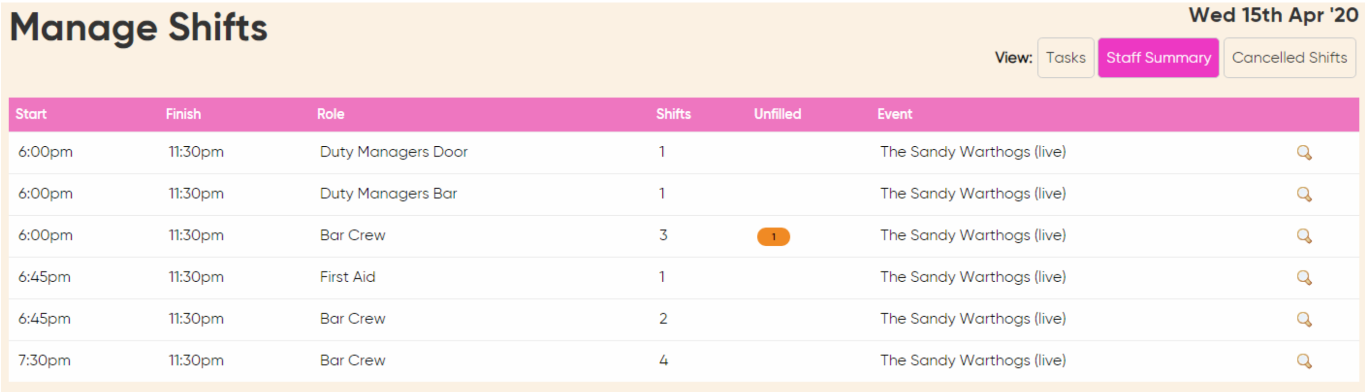
The "Actions" button displays the various things that you can do on this page.

- Swap to Timeline View - This presents you with a timeline view of the staff and their shifts times. You are able to adjust the shift times for each staff member on this page (for more detail see Manage Shifts - Timeline).
- Choose another day - This takes you back to the Shift Management page with the full list of shifts.
- Previous shift - Displays the information for the previously scheduled shift.
- Next shift - Displays the information for the next scheduled shift.
- Duplicate this shift - You can duplicate the shift (staff, times, tasks, etc.) to occur again on another date (for more detail see Duplicating Shifts).
- Email selected shifts - Email a message to the selected shifts. This message will re-email itself to whoever is assigned that shift so if it changes hands for any reason, the staff member will receive a copy of the message.
- Email this shift - Email the shift to all staff that are scheduled to work.
- SMS this shift - Text the shift to all staff that are scheduled to work.
- Email staff not working - Email the shift to all staff members that are not scheduled to work. Please note, this may add up to a lot of people. This is especially useful if there are extra shifts present.
- SMS staff not working - Text the shift to all staff that are not working.
- Create extra shifts - Click here to create extra shifts. Depending on the times and roles, these shifts will then display in relevant staff member's "Available Shifts" list (for more detail see Creating Extra Shifts).
- Create shifts off - Click here to create shifts off. Depending on the times and role, these shifts will then display in the relevant staff member's "Available Shifts Off" list (for more detail see Creating Shifts Off).
- Shift memos - You can add a shift memo (and attachment) that can then be read by other staff members. This may include special requirements, reminders, or preparation documents.

### 6.6.2.1. Staffing Summary

You can enable this option using the View Summary link at the top of the shift grid under Shifts > Manage Shifts > Grid.



Manage Shifts

Wed 15th Apr '20

View: Tasks | Staff Summary | Cancelled Shifts

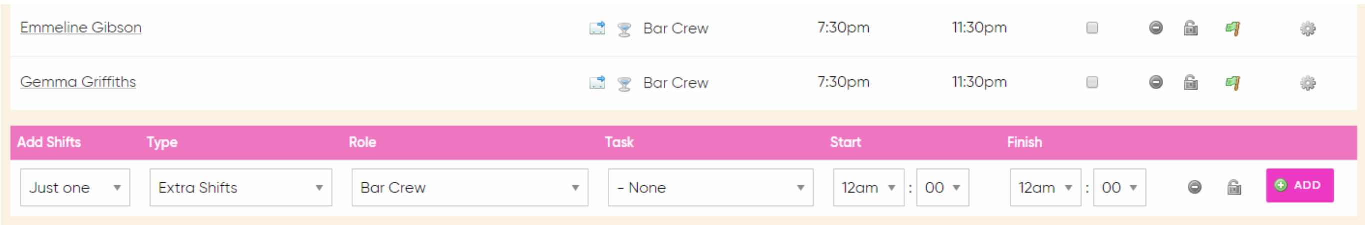
| Start | Finish | Role | Shifts | Unfilled | Event |
|---|---|---|---|---|---|
| 6:00pm | 11:30pm | Duty Managers Door | 1 | | The Sandy Warthogs (live) |
| 6:00pm | 11:30pm | Duty Managers Bar | 1 | | The Sandy Warthogs (live) |
| 6:00pm | 11:30pm | Bar Crew | 3 | 1 | The Sandy Warthogs (live) |
| 6:45pm | 11:30pm | First Aid | 1 | | The Sandy Warthogs (live) |
| 6:45pm | 11:30pm | Bar Crew | 2 | | The Sandy Warthogs (live) |
| 7:30pm | 11:30pm | Bar Crew | 4 | | The Sandy Warthogs (live) |

This will show a summary of the numbers of staff working at different times, different roles and different venues. It will show the number of shifts and if any of them are unassigned at the moment.

Clicking on any of the rows will display the shifts in detail below the summary box.

### 6.6.2.2. Quick Add Shifts

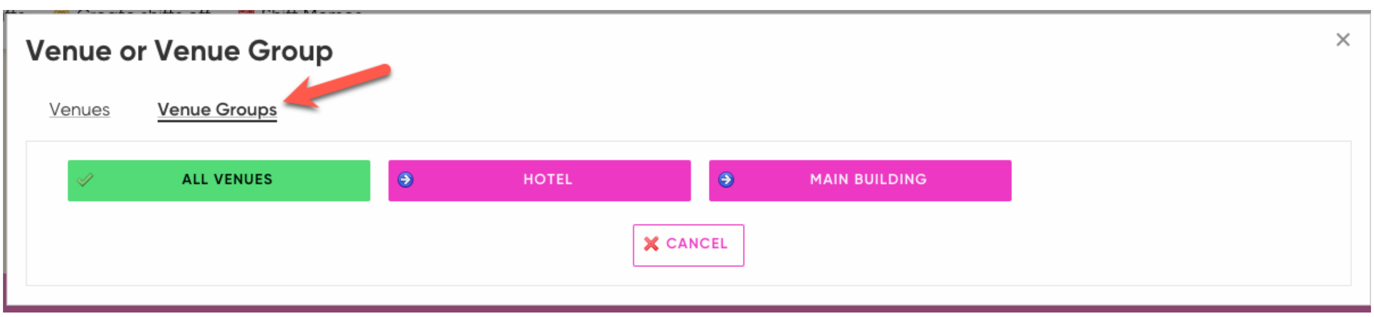
At the bottom of the grid of shifts you will see a section to allow shifts to be quickly added into the day.



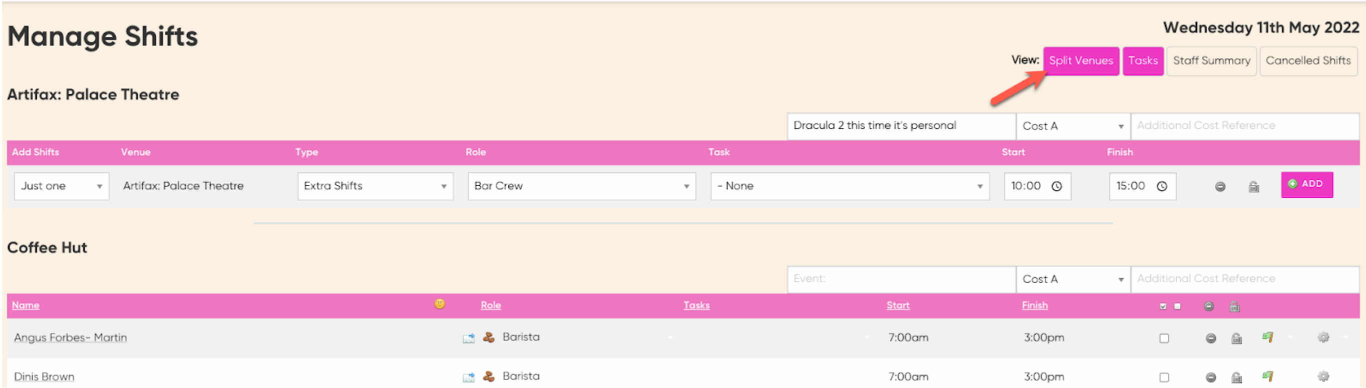

You can add extra shifts  (staff can take the shifts immediately), offered shifts (staff offer to work and managers make the final decision) or unassigned shifts (you must assign the shifts).

### 6.6.2.3. Multiple Venues via Venue Group

Multiple venues can be grouped together to form an umbrella ‘Venue Group’. This can be managed under Dashboard > System > Venues > Venue Groups.
Under the actions menu, you can access the option to Create a Venue Group which will allow you to manage multiple venues at the same time.



Once enabled, you can manage this by clicking the Venue button in the right hand side of the page next to the search bar and going into 'Venue Groups'. From here click the venue group you would like to manage.




The grid view will show each of the venue's shifts in a single grid view. You can split the venues out (but keep them on the same page) by using the Split Venues option in the top right.

The grid tools all remain the same with either of these modes used.

### 6.6.2.4. Staff Members and Assign Shift

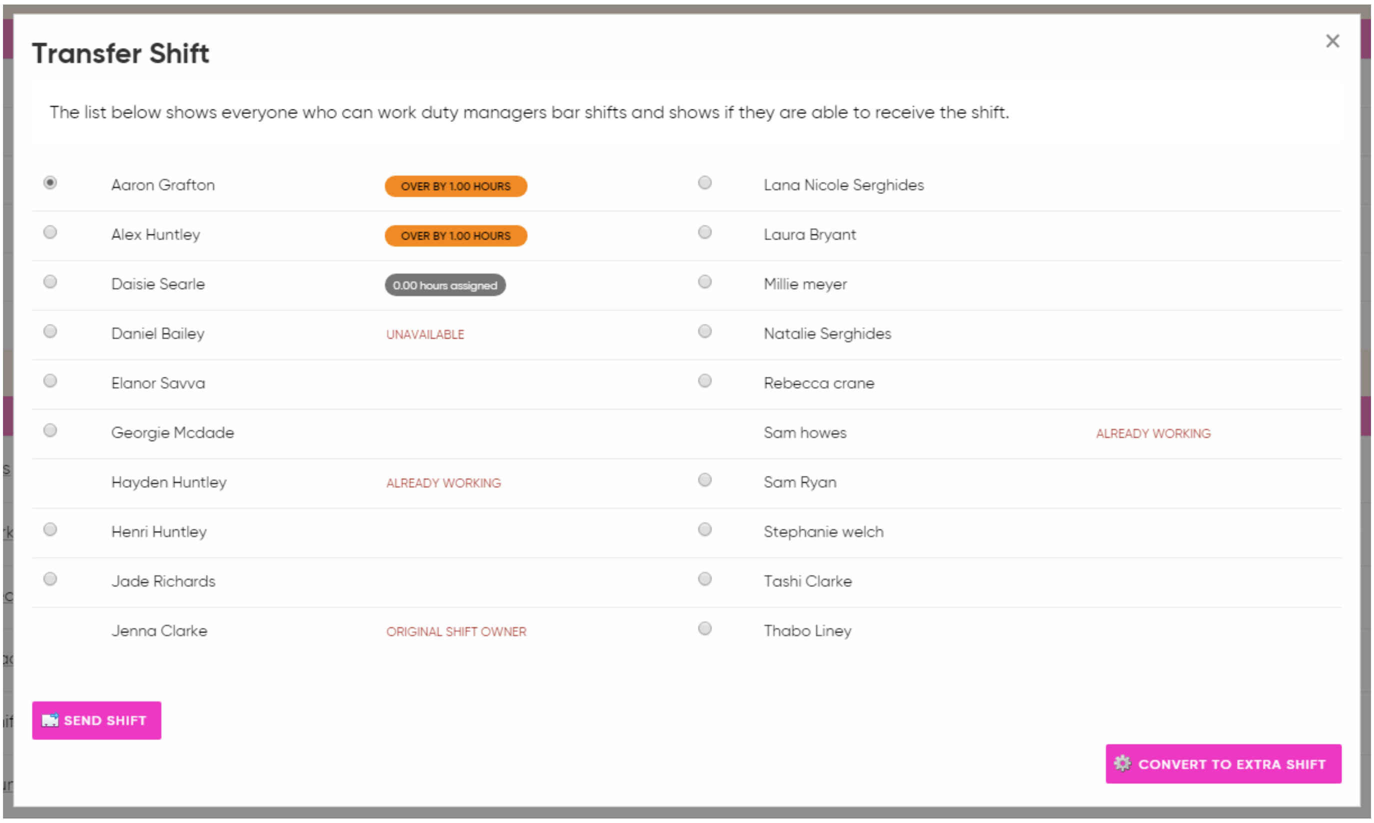
Clicking the name of the staff member will redirect you to that person's profile page. Here you can find their personal information, contact details, and their training and skills.

You are also able to give the shift to another member of staff. Click the letter icon to the right of their name under 'Role'. You will see a list of staff members that match the same skills and role and their availability to work. Select the staff member that you would like to take the shift then click "Assign Shift". This will alert the recipient, update the shift list, and remove the shift from the original staff member's list.

If the staff member is assigned to a Casual contract with no minimum hours then it will display the number of hours they currently have for this period in a grey box to the right of their name. This allows you to spread hours out equally.

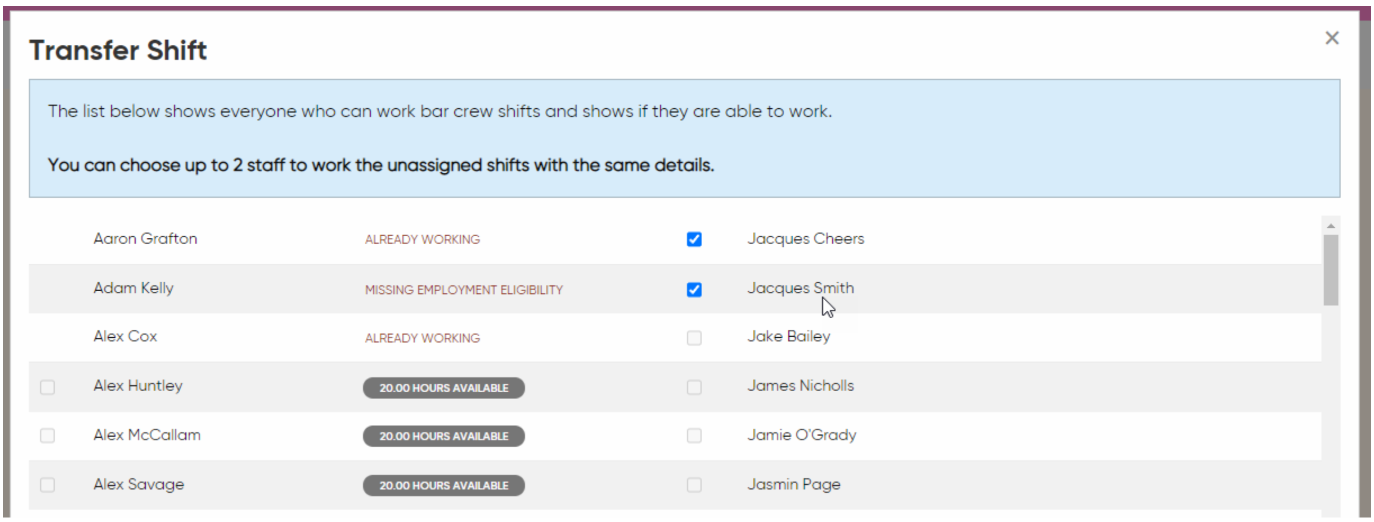
If the staff member has minimum hours or is on a permanent contract then it will highlight if the staff member is under or over their required hours. Anything in green shows they need hours and orange indicates that they are over their hours for this period.




### 6.6.2.5. Assigning Shifts Manually in Bulk

If you have multiple unassigned shifts (for example, you have 2 offered shifts with the same details), you can click the cog iconto assign any of those shifts and the system will display the option for you to assign them all out at the same time.




The popup will inform you how many staff you can select and will allow you to check up to that number to assign. The shifts will then be assigned out to the staff once you click Assign Shifts.

### 6.6.2.6. Roles and Tasks

You can update or change their role for the shift via the dropdown in the “Role” column. This will update their personal shift display, too.

You can add, change, or remove tasks for their shift in the “Tasks” column.

### 6.6.2.7. Changing Shift Times

There are several ways that you can change shift times; using the Cog icon to edit a single shift directly or updating the shift times in bulk. Use the check box next to each shift to choose the shifts you want to update.

### 6.6.2.8. Updating shifts in Bulk

**Tip:** clicking on the ‘start’ or ‘finish’ times for the shift will select all of those shifts with the same start or finish time to make updating them quick and easy.

Once selected, scroll to the bottom of the list of shifts. You can use either the time warp option (this will move the start and finish times of the shifts earlier or later - so moving the whole shift.) or set the start and/or finish times exactly by choosing the times you wish the shifts to have.

If you are moving lots of shifts around to provide coverage of skills, we’d suggest trying the timeline view. You can access it under the Actions menu at the top of the page and this provides a colour-coded timeline view of the whole day (see Manage Shift Timeline).

### 6.6.2.9. Locking and Hiding

You can lock or hide individual shifts by clicking the padlock or no entry icon, respectively. Locking a shift means that the member of staff is unable to change or ask for cover and hiding a shift means that the staff member cannot see the shift. This is useful for making a lot of changes to the schedule before revealing it to all staff. Staff will not be penalised if they do not show up for a hidden shift.

You can also lock and hide a shift. This means the shift will remain locked once the shifts have been published/unhidden.

### 6.6.2.10. Attendance

You are able to highlight staff attendance using the flags in the second to last column. Each flag colour denotes a certain attendance state.

- Green = Attended

- Blue = Arrived Late
- Yellow = Acceptable absence (i.e. personal/called ahead)
- Red = Unacceptable absence (i.e. did not call ahead/bad excuse)
- Black = Escalated unacceptable absence

Flags can be updated at any time via the Shift Management page. For shifts in the past, use the Actions button on the Manage Shifts listing page to change to previous dates. Once you view the shifts on a specific date then you are able to change the flag.

If you wish to change the titles or icons of each attendance reason then you can do this under System > HR Settings > Non Attendance Reasons.

### 6.6.2.11. Cancelling Shifts

You are able to cancel shifts using the “x” under the cog icon. This will remove the member of staff from the shift and update their shift list accordingly.

You can also select the shifts you want to cancel and at the bottom of the page, a box will appear that allows you to change the selected shifts or cancel them in bulk.

### 6.6.2.12. Shift Events

You are able to assign a title or event name either to a whole day or to a certain period of time. The title or name can be anything and is designed to tell staff what is happening during a shift. Any shift that starts after the event start time will be part of that event so ensure events start before the first person is scheduled to start work.

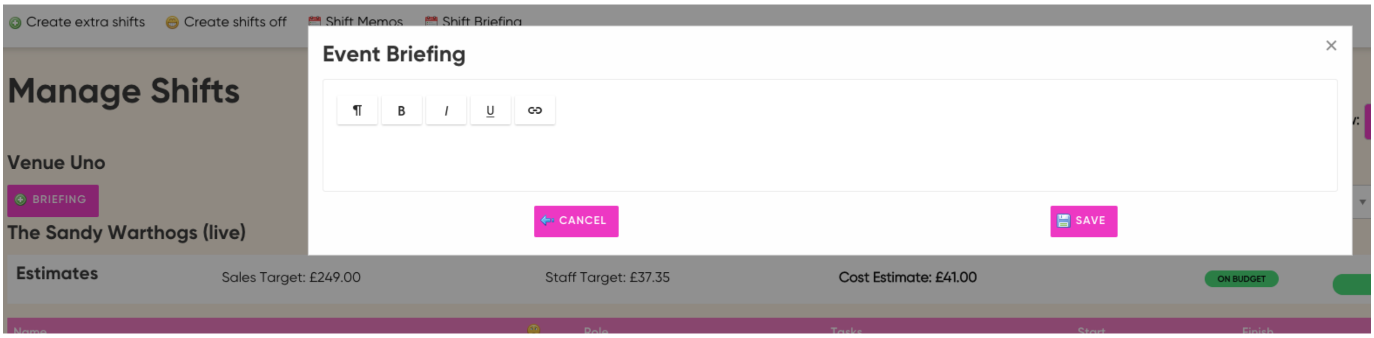
This is enabled per venue under the Shift Configuration settings tab in the Manage Venues section  and will display a box at the top of the shift grid page to enable the title to be entered.

You can also set this information in bulk for the whole month at the same time. See Dashboard > Staff > Staff > Manage Staff Events.

### 6.6.2.13. Event / Day Briefing Notes

You can add detailed briefing notes to events or to a whole day within a single venue. Enable this under the Shift Configuration tab of the Manage Venues page when editing.

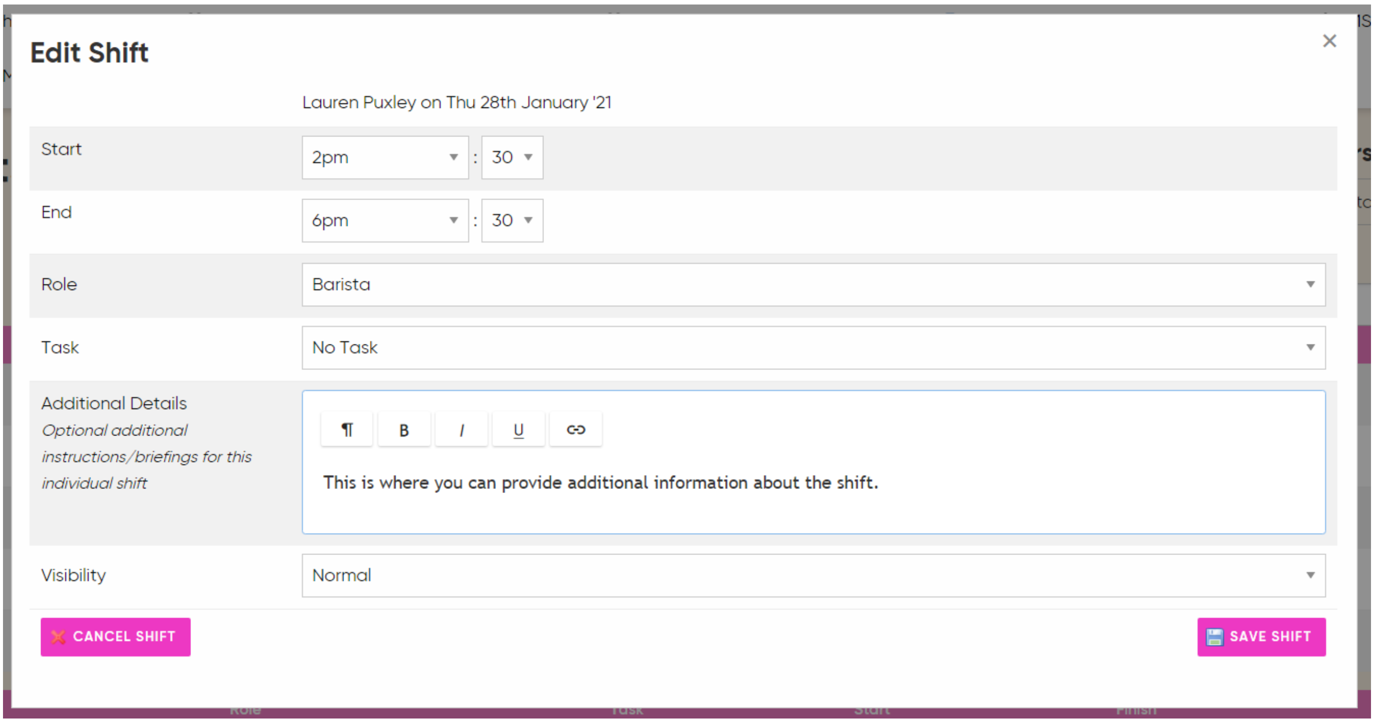



Once enabled, you will find a Briefing button appear above the event title within the shift grid page. This allows you to enter the briefing details as needed. The details will be displayed on the shift details pages for any staff member working during that event or on that day (if not associated with an event).

## 6.6.2.14. Individual Shift Notes

Each individual shift can have shift notes assigned. These are displayed on the shift details page for the shift so that the staff member can see the details before, during and after the shift.

To view and update the notes, simply use the Edit option (Cog icon) for that individual shift on either the Grid view or the shift week view.



### 6.6.2.15. Shift Cost Codes

Cost Codes allow for very detailed tracking of whole days and even individual time entries for reporting purposes.

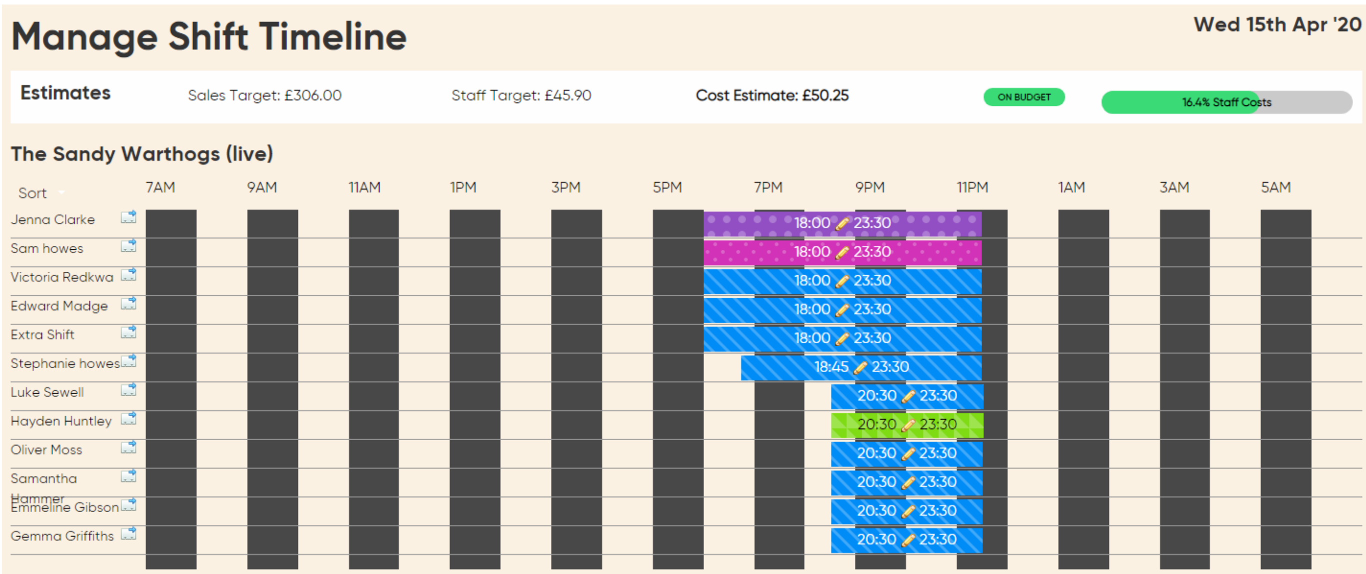
Cost codes are enabled under the Configuration tab of the Global Settings page. This will display a box at the top of the shift grid page to set a cost code for all shifts at this venue on that day. They can also be customised per shift or time entry.
Cost codes can be used with Pay Report Groups to create instant summaries on reports.

You can have up to four cost codes, set custom labels plus configure preset lists of cost codes that staff can select. See Managing Cost Codes for more information.

You can also set this information in bulk for the whole month at the same time. See Cost Code Management.

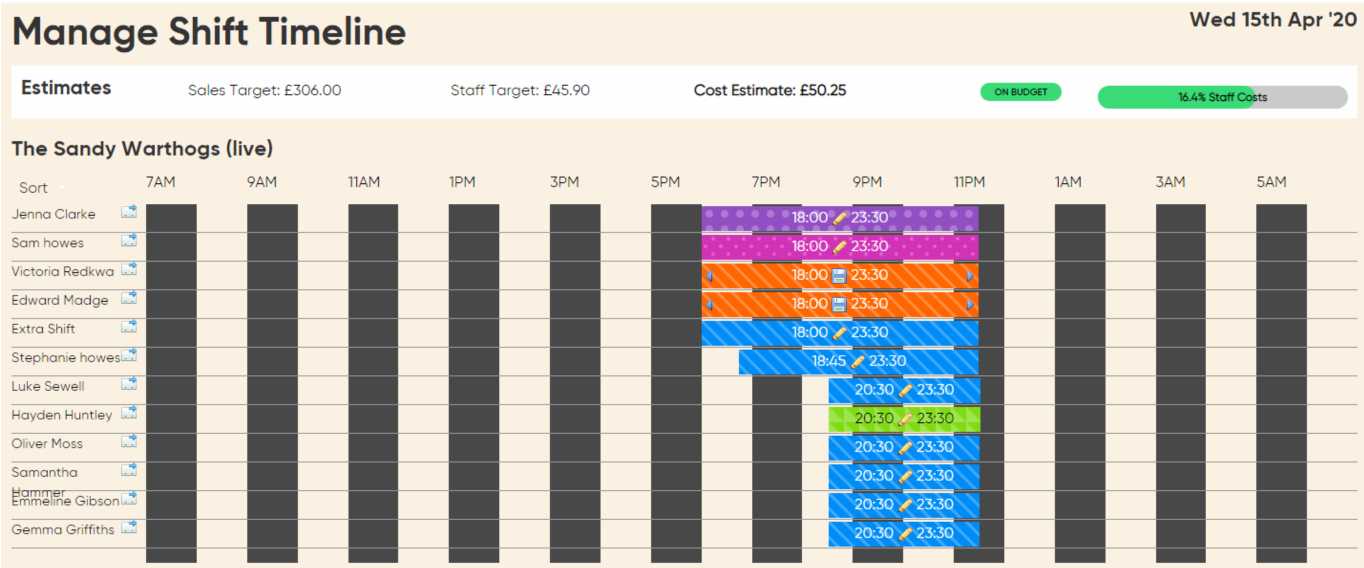
## 6.6.3. Manage Shift Timeline

This presents you with a list of staff members and their shift times on a timeline. This can be accessed by clicking the 'Swap to Timeline View' in the Actions bar in grid view.



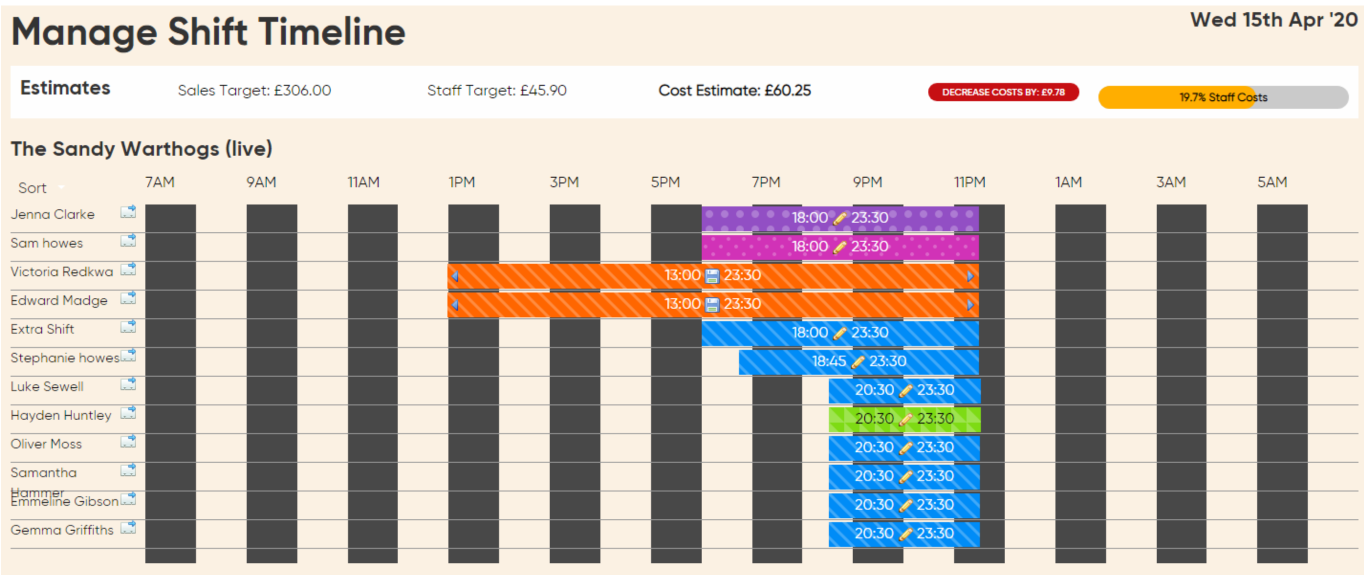

To change the times of a shift, click on the pencil icon in the middle of the two times. The times will now highlight in orange.




Click and drag the ends of the orange box to extend the shift in either direction. You can opt to inform the staff that you have changed the shift times by checking the checkbox in the top left. Once you are happy with the changed times, click the save icon.

As you change the shift times, the estimated cost in the top right will update to provide you with instant estimates for the shift. This is based on the pay elements set per skill or person on the schedule. It does not include any additional overheads or PAYE contributions.




This will update the shift list to reflect the changed times.

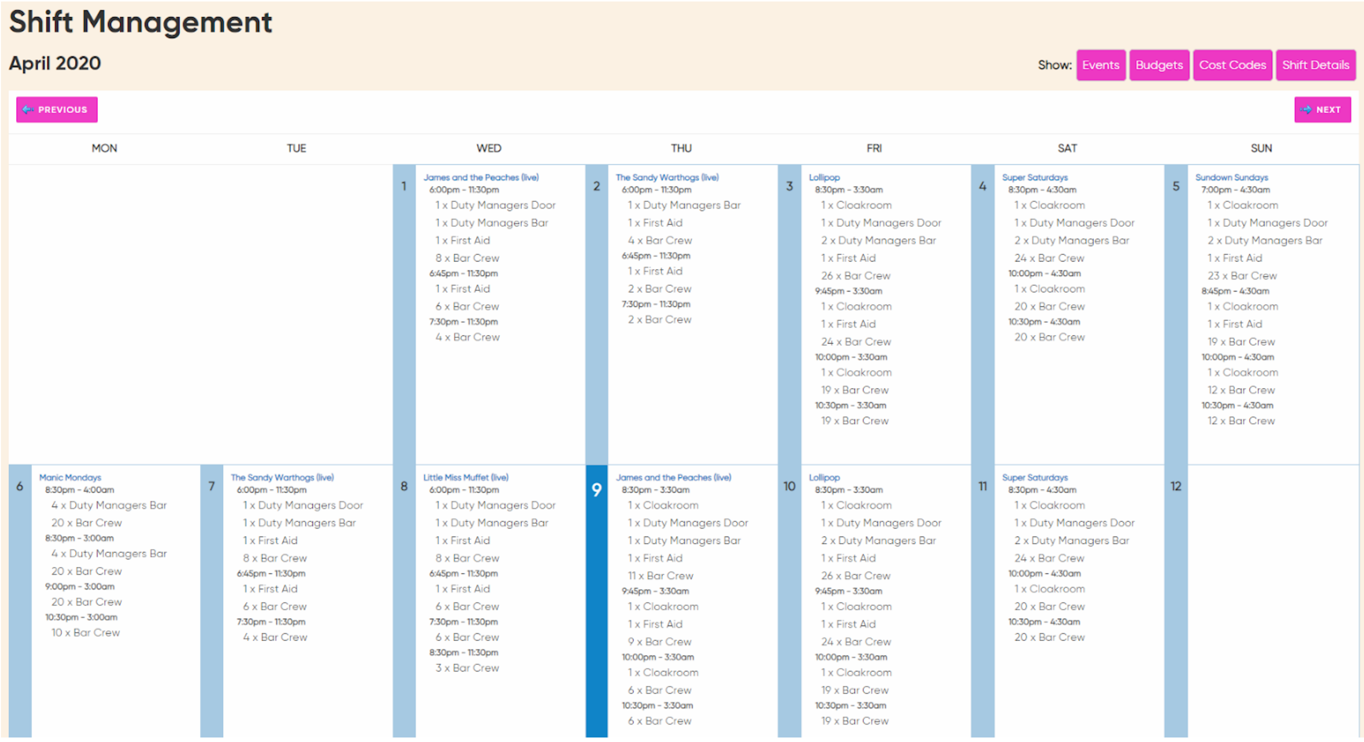
### 6.6.4. Shift Calendar View

The shift calendar view shows all the shifts happening at the current venue or selected venue group. This can be viewed via Dashboard > Reports > Shift Reports > Shift Calendar.

The page shows a month at a time and can either show just a total number of shifts each day or the shift breakdown. This  is turned on/off in the top right of the page. It will show a breakdown of shift times and skills.

You can also display event titles and cost codes on each day.




## 6.6.5. Linked Shifts

Linked Shifts are two or more individual shifts that are joined together. A single staff member must be assigned to all of the linked shifts.

This is perfect for split shifts or staff that work two different roles back to back. Staff will see that the shifts are linked and if they wish to find cover, they must find cover for all of the linked shifts too (by the same staff member). They can be recognised by the link icon ( ).


| Date | Event | Times | Role | Venue | Info | |
|---|---|---|---|---|---|---|
| Mon 13th Apr '20 | Manic Mondays | 8:30pm - 3:00am | DM Bar | Venue Uno | OPTIONS | VIEW DETAILS |
| Mon 20th Apr '20 | Manic Mondays | 8:30pm - 3:00am | DM Bar | Venue Uno | | VIEW DETAILS |
| Mon 27th Apr '20 | Manic Mondays | 8:30pm - 3:00am | DM Bar | Venue Uno | | VIEW DETAILS |

Linked shifts are new and can only be created via either a Schedule Template or the new Quick Shift Template.

### 6.6.5.1. Schedule Template with Linked Shifts

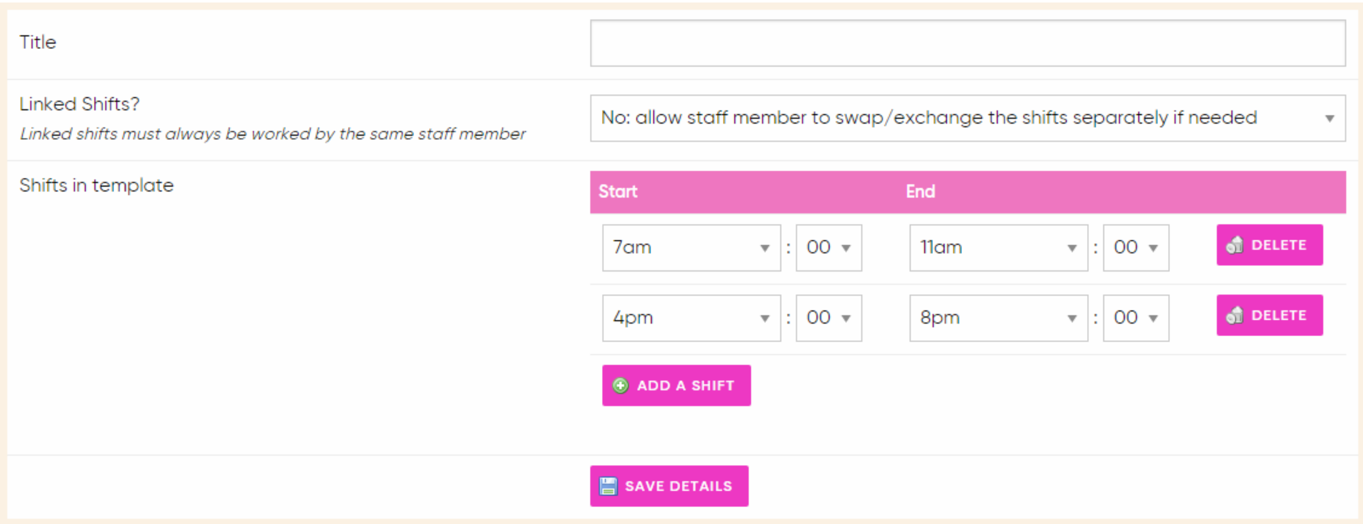
To add linked shifts to the schedule template, simply use the Linked Shifts icon ( ). This will duplicate the shift with slightly changed times. The new shift will have a link icon next to the times to indicate the linked part. Navigate via Dashboard > Shifts > Schedule Creation > Manage Scheduling and then click on event/day.

| Staff Member / Fill From Role | Shift Role | Start | End | Task | D.R | Split | Fill Method | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| 2 x Duty Managers Bar | DM Bar | 8:00PM | 3:30AM | | ✓ | ✗ | Equal Shift Spread | | | |
| 2 x Duty Managers Bar | DM Bar | 3:30AM | 4:30AM | | | | | | | |

When the preview shifts are created, the system will only allocate the linked shifts to a single staff member.

### 6.6.5.2. Quick Shift Templates with Linked Shifts

The quick shift templates can also be configured to create linked shifts. All that is needed is for both of the times to be added to the template and the Linked Shifts option set to Yes.




When choosing the template on the week view will automatically add both of the shifts in the template and link them together.

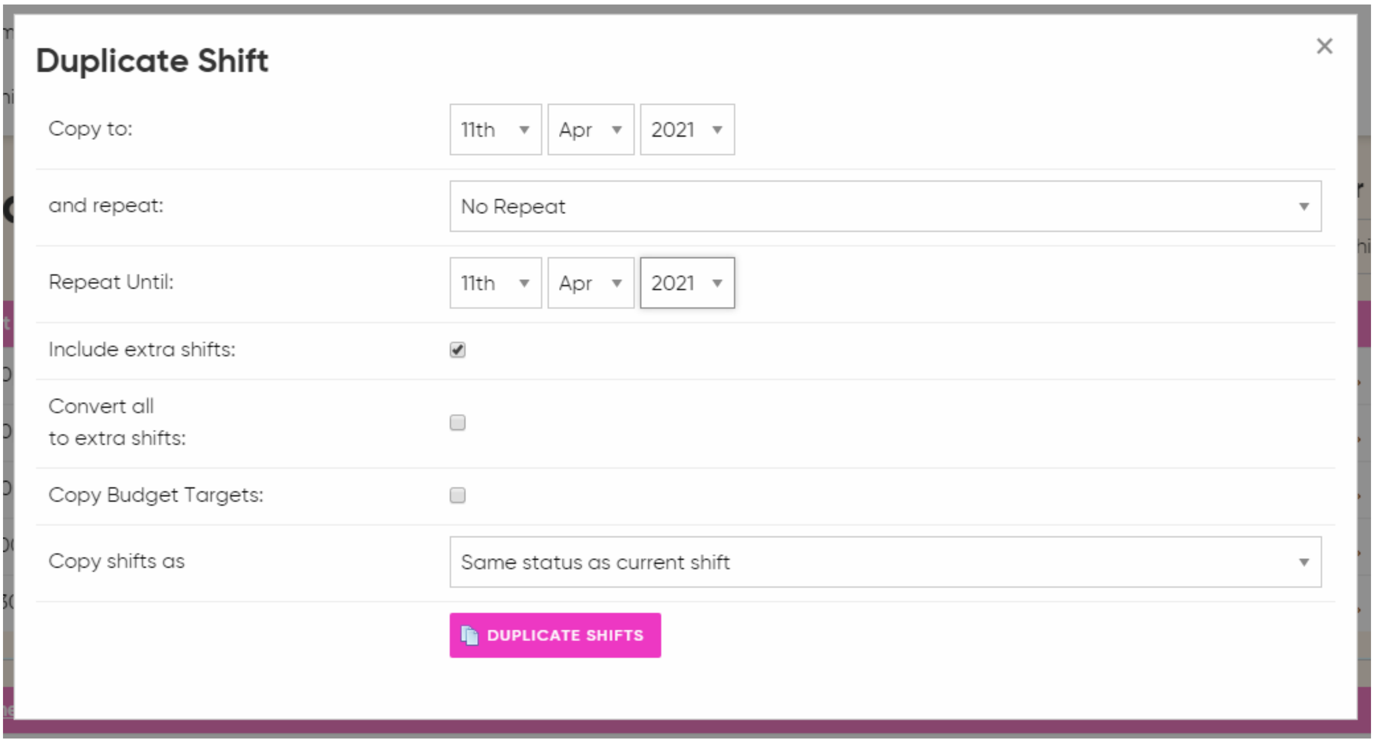
### 6.6.6. Duplicating Shifts

To duplicate a shift, firstly click on the shift that you would like to duplicate. From the "Actions" dropdown, select "Duplicate shift.

You will see a popup (below) with the information to complete in order to duplicate the shift.

- **Copy to**
  Determine the date of the new shift.
- **And repeat**
  Determine whether the shift will be repeated (by day, week, or not at all).
- **Repeat Until**
  If you do select the shift to be repeated, you can select an end date.
- **Include extra shifts**
  If the original shift has extra shifts listed, you can choose to keep these in the new shift or remove them.
- **Convert all to extra shifts**
  Rather than copying the staff members that are working the original shift, you can decide to open the new shift to all staff members. This will then appear in “Available Shifts”.
- **Copy Budget Targets**
- Enable budget targets to be copied over.**Copy shifts as:** You can determine how the shift will be displayed (the same as the original, return all shift states to normal, lock all shifts, or hide all shifts).




Once happy with the information, click “Duplicate Shifts”.

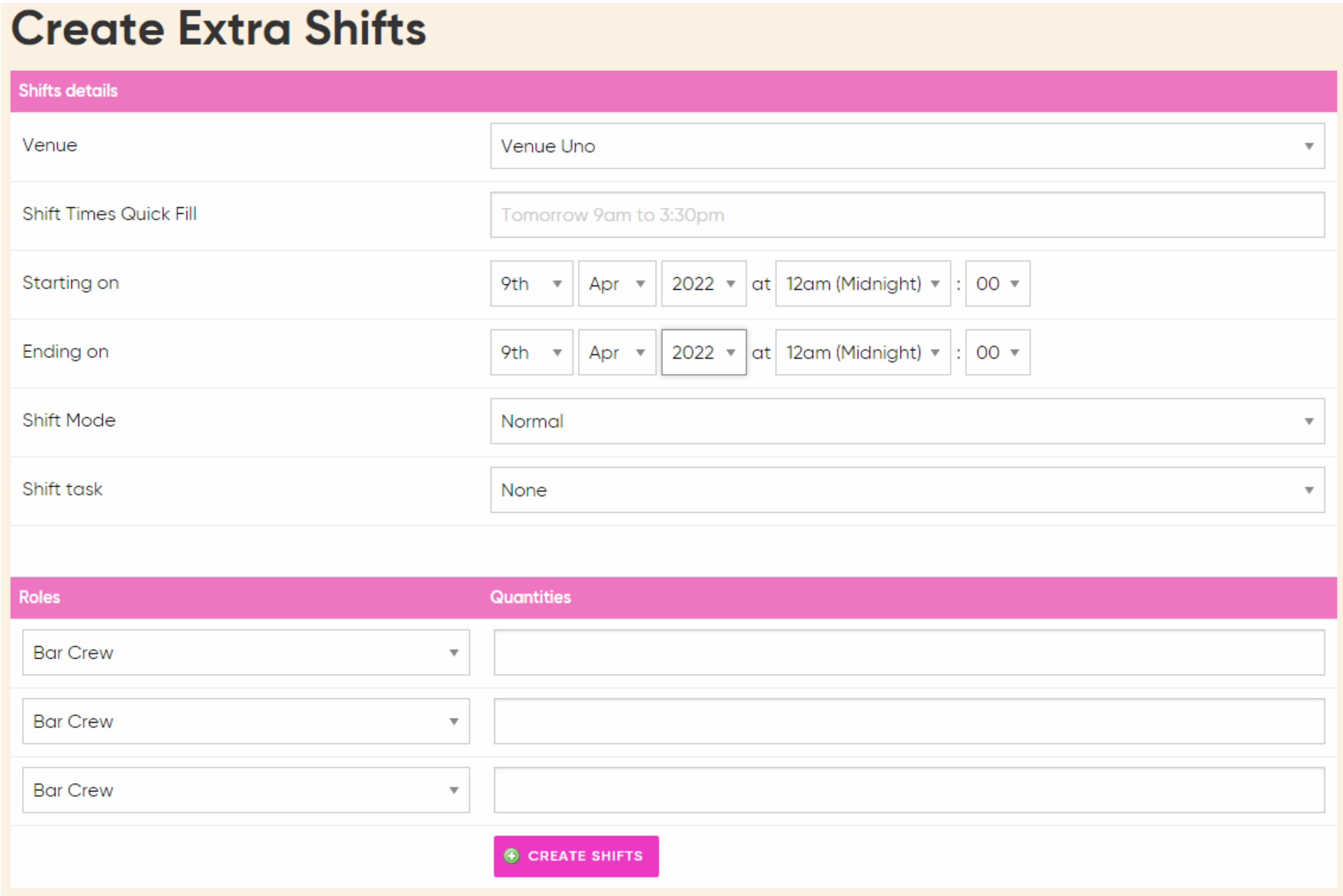
In the event that someone from the original shift is unable to work the duplicate due to a clash with an existing shift, you will be notified. These will not be copied to the new list, so you may want to either create a single shift (see[Creating a Single Shift]) or create extra open shifts (see [Creating Extra Shifts]) to account for the staff.

### 6.6.7. Creating Extra Shifts

Extra shifts are created and then listed in the “Available Shifts” section for the relevant staff members.

You can create extra, offered or unassigned shifts directly from the grid view using the Quick Add section below the shifts. There is also a dedicated page to add extra shifts. You can do this under Shifts > Create > Create Extra Shifts.

You will be directed to a new page (below) with the information to complete in order to create the extra shift or shifts.




- **Venue**
  Select the appropriate venue.
- Shifts Times Quick Fill
  Enter a time period you want to fill.
- **Starting/Ending on … at**
  Determine the start and end dates and times for the new shift.

- **Shift Modew**
  Select from the dropdown the appropriate status of the shift (normal, hidden, locked or hidden and locked).
- **Shift task**
  Select any tasks that need to be completed during the shift.
- **Roles**
  Determine the shift role that the extra shift is being created for. You can select up to three different roles.
- **Quantities**
  Determine how many extra shifts for each role need to be created. If you leave the field blank then that role will not be added to the shift.

Once you are happy with the information, click “Create Shifts”.

You will see a confirmation message that these shifts have been created. You can then click the link to manage the shifts in more detail (adjust times and tasks, send the shift to a member of staff, and so on).

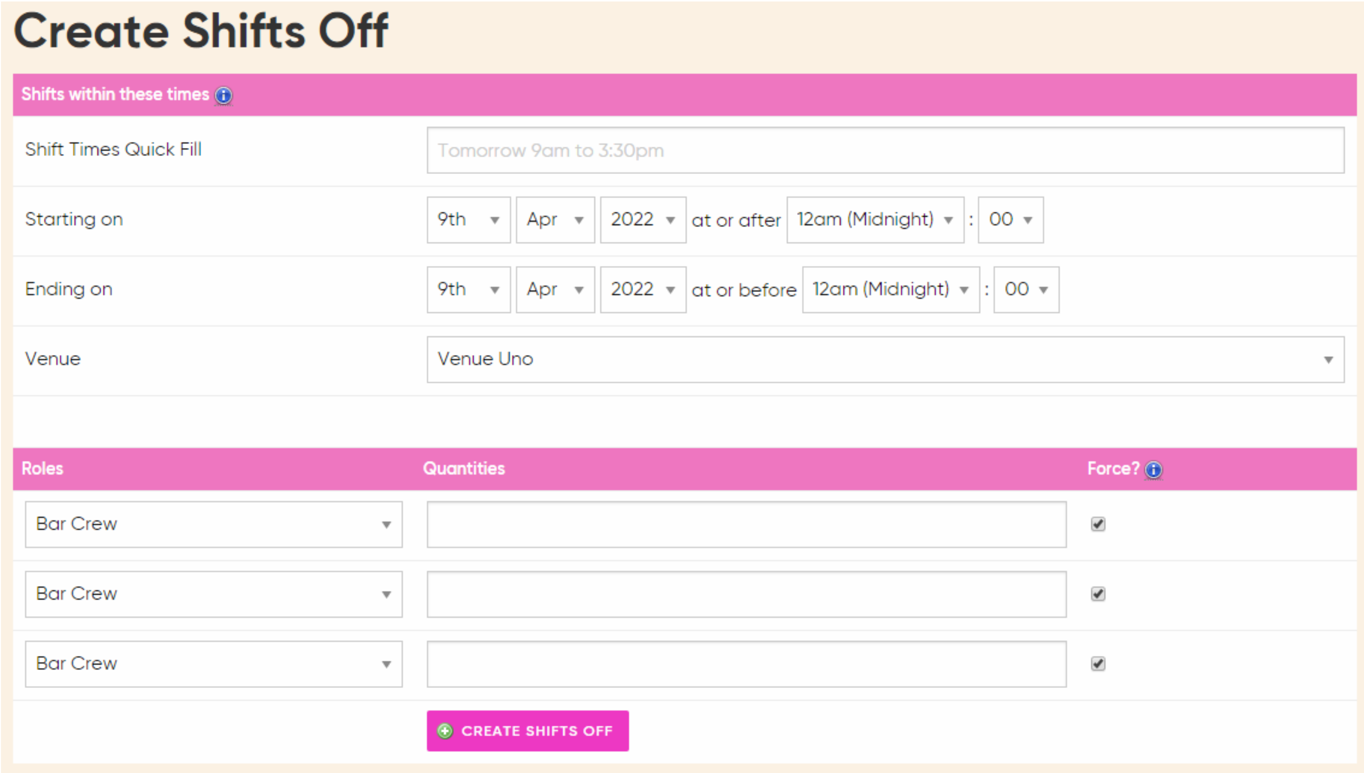
### 6.6.8. Creating Shifts Off

In the event that you have scheduled too many people for a shift, you can either cancel a particular staff member’s shift, or create the opportunity for staff to elect to take the shift off.

Select the shift that you want to create the shift off for, then select “Create Shifts Off” from the “Actions” dropdown.

You will be directed to a new page (below) with the information to complete in order to create the shift or shifts that can be taken off.




**Starting/Ending on … at or after/before:** Select the dates and times that are available to take off.

**Venue:** Select the appropriate venue.

**Roles:** Determine which role or roles can be taken off.

**Quantities:** Determine how many staff members in each role are available to take the shift off.

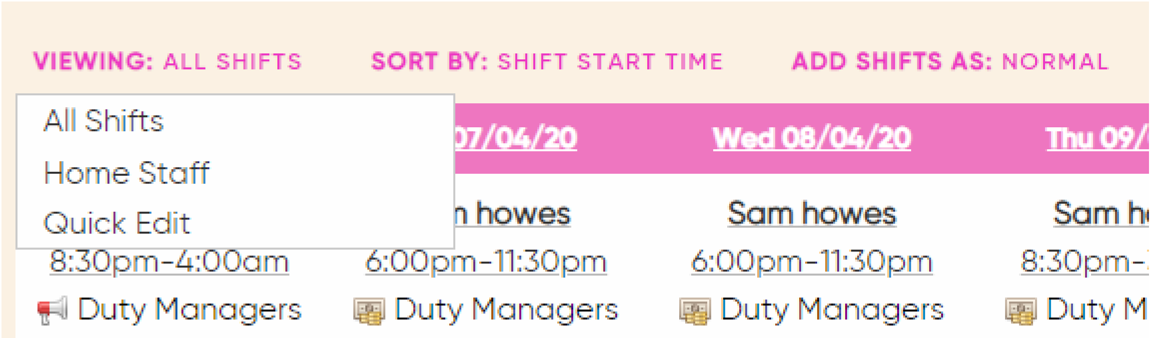
**Force?:** If checked, the staff members that meet this criteria will be forced to take the night off. If unchecked, then this will appear in their "Available Shifts Off" list, and they can elect to take the shift or continue to work as scheduled.

Once you are happy with the details, click "Create Shifts Off". These will then be added to the system and show in the relevant staff member's "Shifts Off" list.

### 6.6.9. Manage Shift Week

This option allows a full week of shifts to be viewed and managed. There are several ways to view the shifts and these provide different layouts and functions.

There are three "views" of the week page:



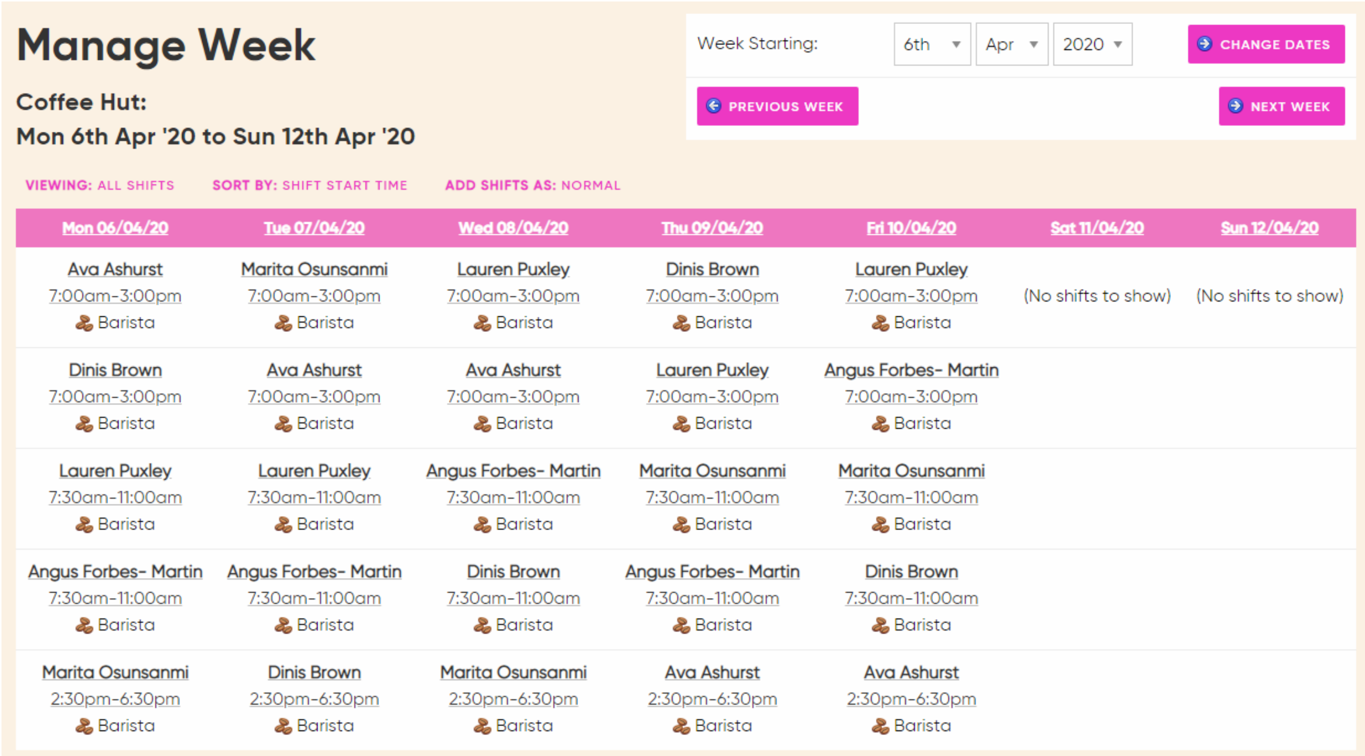

- **All Shifts**
  This will list all of the shifts at a single venue for the given week. This will include unassigned, offered and extra shifts.
- **Home Staff/Assigned Staff**
  This will display each of the staff based or assigned at the selected venue. Each of their shifts will be displayed per day. You can easily add shifts using the green plus icons.
  Change between the Home Staff/Assigned Staff options on the venue details page.
- **Quick Edit**
  This is a different view of the Home Staff view that is designed to work in a similar way to Excel. Simply type in the times for shifts and they will be added.

### 6.6.9.1. All Shifts view sorted by Shift Start Time:

Each of the shifts on a given day will be shown and ordered by their start time. Unassigned, offered and Extra shifts are marked with an unknown face icon to further highlight that no one is yet working.

#### 6.6.9.2. View by Role Hierarchy



Manage Week

Coffee Hut:
Mon 6th Apr '20 to Sun 12th Apr '20

Week Starting: 6th Apr 2020 CHANGE DATES

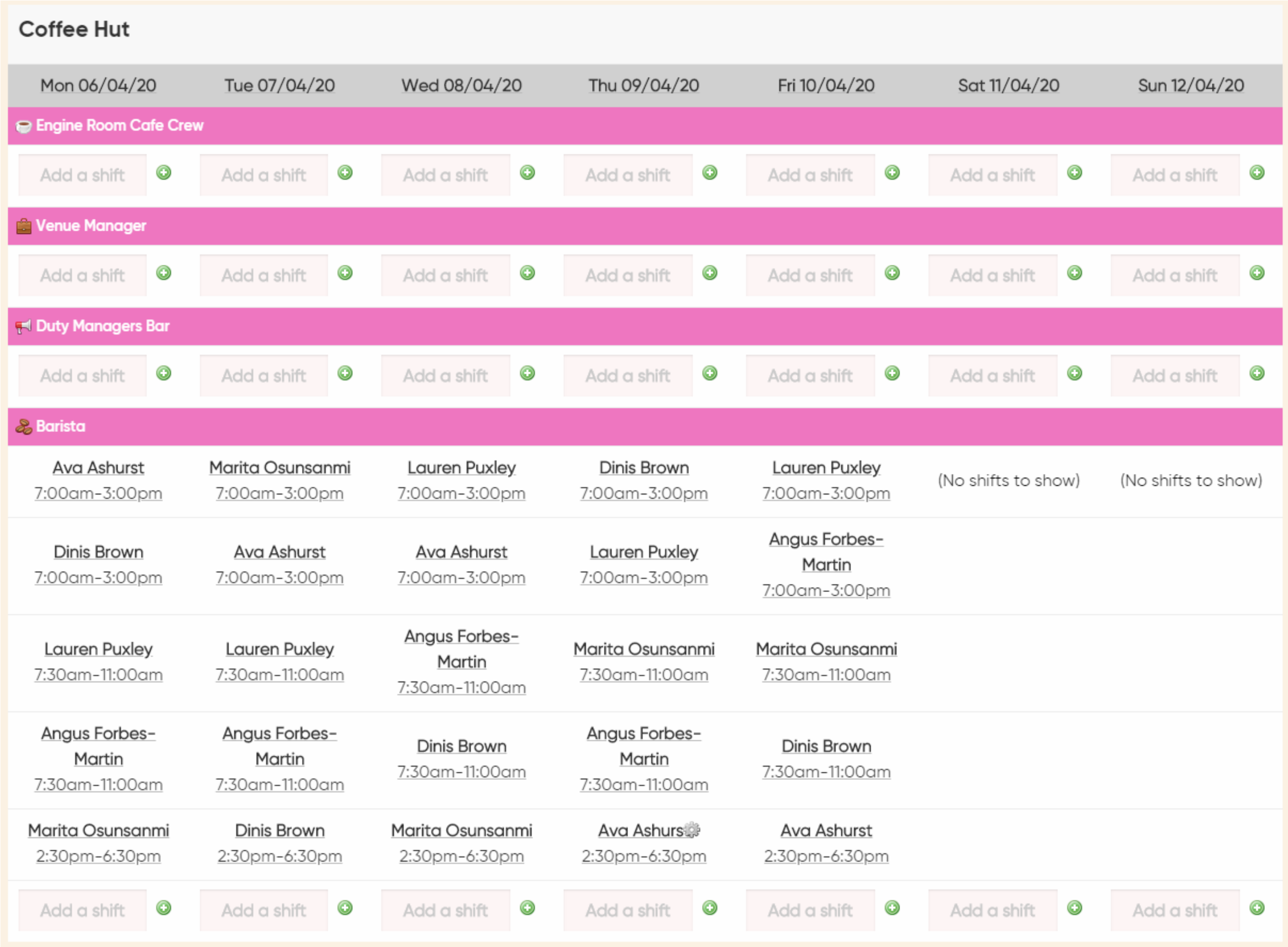
PREVIOUS WEEK NEXT WEEK

VIEWING: ALL SHIFTS SORT BY: SHIFT START TIME ADD SHIFTS AS: NORMAL

| Mon 06/04/20 | Tue 07/04/20 | Wed 08/04/20 | Thu 09/04/20 | Fri 10/04/20 | Sat 11/04/20 | Sun 12/04/20 |
|---|---|---|---|---|---|---|
| Ava Ashurst 7:00am-3:00pm Barista | Marita Osunsanmi 7:00am-3:00pm Barista | Lauren Puxley 7:00am-3:00pm Barista | Dinis Brown 7:00am-3:00pm Barista | Lauren Puxley 7:00am-3:00pm Barista | (No shifts to show) | (No shifts to show) |
| Dinis Brown 7:00am-3:00pm Barista | Ava Ashurst 7:00am-3:00pm Barista | Ava Ashurst 7:00am-3:00pm Barista | Lauren Puxley 7:00am-3:00pm Barista | Angus Forbes- Martin 7:00am-3:00pm Barista | | |
| Lauren Puxley 7:30am-11:00am Barista | Lauren Puxley 7:30am-11:00am Barista | Angus Forbes- Martin 7:30am-11:00am Barista | Marita Osunsanmi 7:30am-11:00am Barista | Marita Osunsanmi 7:30am-11:00am Barista | | |
| Angus Forbes- Martin 7:30am-11:00am Barista | Angus Forbes- Martin 7:30am-11:00am Barista | Dinis Brown 7:30am-11:00am Barista | Angus Forbes- Martin 7:30am-11:00am Barista | Dinis Brown 7:30am-11:00am Barista | | |
| Marita Osunsanmi 2:30pm-6:30pm Barista | Dinis Brown 2:30pm-6:30pm Barista | Marita Osunsanmi 2:30pm-6:30pm Barista | Ava Ashurst 2:30pm-6:30pm Barista | Ava Ashurst 2:30pm-6:30pm Barista | | |

You can also view this page by role. Simply change the Sort by option in the top right of the screen to By Role Hierarchy.



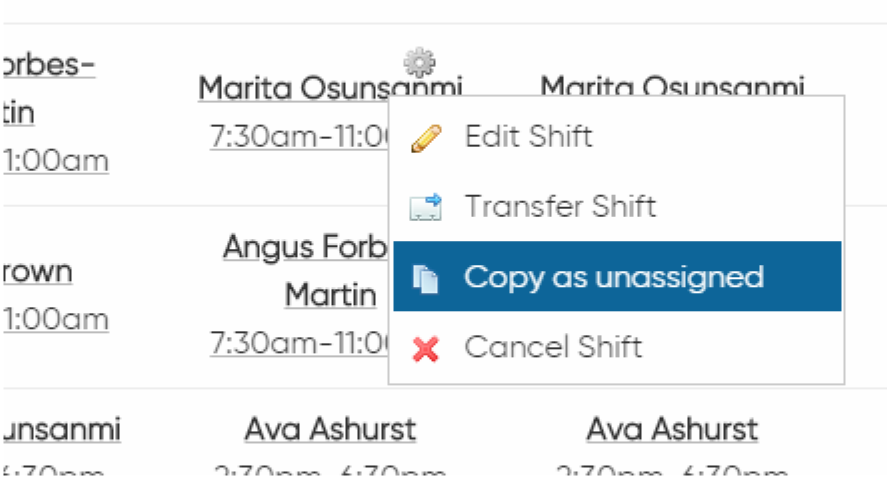
Coffee Hut

| Mon 06/04/20 | Tue 07/04/20 | Wed 08/04/20 | Thu 09/04/20 | Fri 10/04/20 | Sat 11/04/20 | Sun 12/04/20 |
|---|---|---|---|---|---|---|
| Engine Room Cafe Crew | | | | | | |
| Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift |
| Venue Manager | | | | | | |
| Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift |
| Duty Managers Bar | | | | | | |
| Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift |
| Barista | | | | | | |
| Ava Ashurst 7:00am-3:00pm | Marita Osunsanmi 7:00am-3:00pm | Lauren Puxley 7:00am-3:00pm | Dinis Brown 7:00am-3:00pm | Lauren Puxley 7:00am-3:00pm | (No shifts to show) | (No shifts to show) |
| Dinis Brown 7:00am-3:00pm | Ava Ashurst 7:00am-3:00pm | Ava Ashurst 7:00am-3:00pm | Lauren Puxley 7:00am-3:00pm | Angus Forbes-Martin 7:00am-3:00pm | | |
| Lauren Puxley 7:30am-11:00am | Lauren Puxley 7:30am-11:00am | Angus Forbes-Martin 7:30am-11:00am | Marita Osunsanmi 7:30am-11:00am | Marita Osunsanmi 7:30am-11:00am | | |
| Angus Forbes-Martin 7:30am-11:00am | Angus Forbes-Martin 7:30am-11:00am | Dinis Brown 7:30am-11:00am | Angus Forbes-Martin 7:30am-11:00am | Dinis Brown 7:30am-11:00am | | |
| Marita Osunsanmi 2:30pm-6:30pm | Dinis Brown 2:30pm-6:30pm | Marita Osunsanmi 2:30pm-6:30pm | Ava Ashurst 2:30pm-6:30pm | Ava Ashurst 2:30pm-6:30pm | | |
| Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift | Add a shift |

This page will then show each of the roles assigned to your venue and the shifts within them for each day. You can set which roles to display under the Roles tab within your Venue Settings.

When in the hierarchy mode, you are able to use several tools available. The first is that you can add a shift by simply typing the required times (9am to 5pm for example) into the Add a shift box and clicking the green icon. The second new feature is when you hover over a shift, a cog icon will appear in the top right. Simply hover over this icon to get quick access to make changes to the shift:



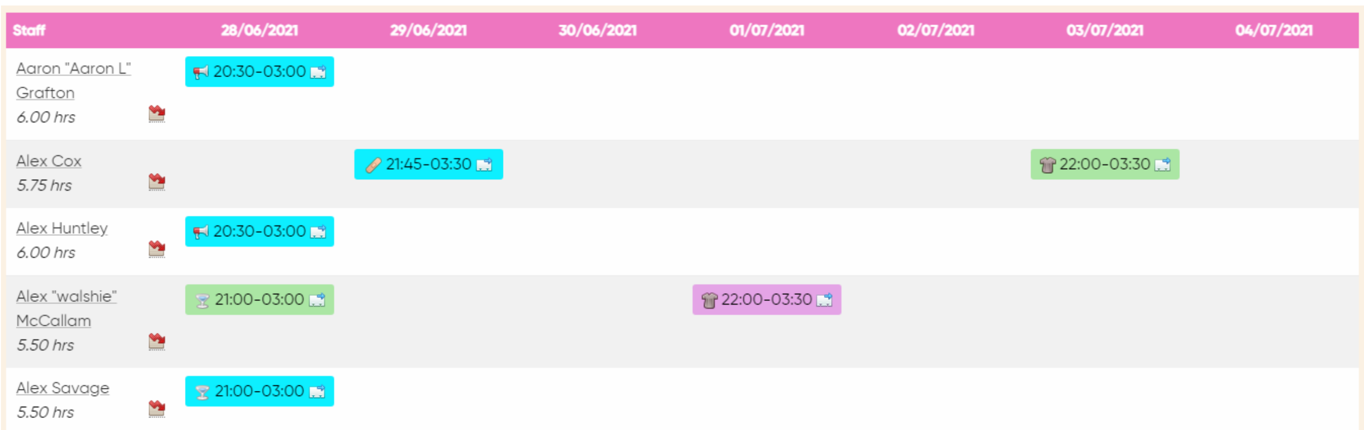

- **Editing the shift** will bring up the details for that shift and allow you to edit all of them quickly. You can also just click on the shift times to show this popup.
- **Transfer/assign shift** will show you the send shift popup so you can choose a new staff member. You can also just click on the staff member's name to show this popup.
- **Copy / copy as unassigned** will create a new shift with the same times and details but mark it as unassigned so you can then choose a new staff member to work.
- **Cancel shift / delete shift** will remove the shift.

### 6.6.10. Venue Groups on Shift Week view

When viewing a shift week view within a venue group, the shifts will be colour-coded depending on which venue they are due to take place within.

You can, if required, return to a split view where each venue is shown repeated down the page. This option is in the line of view options at the top of the week view.

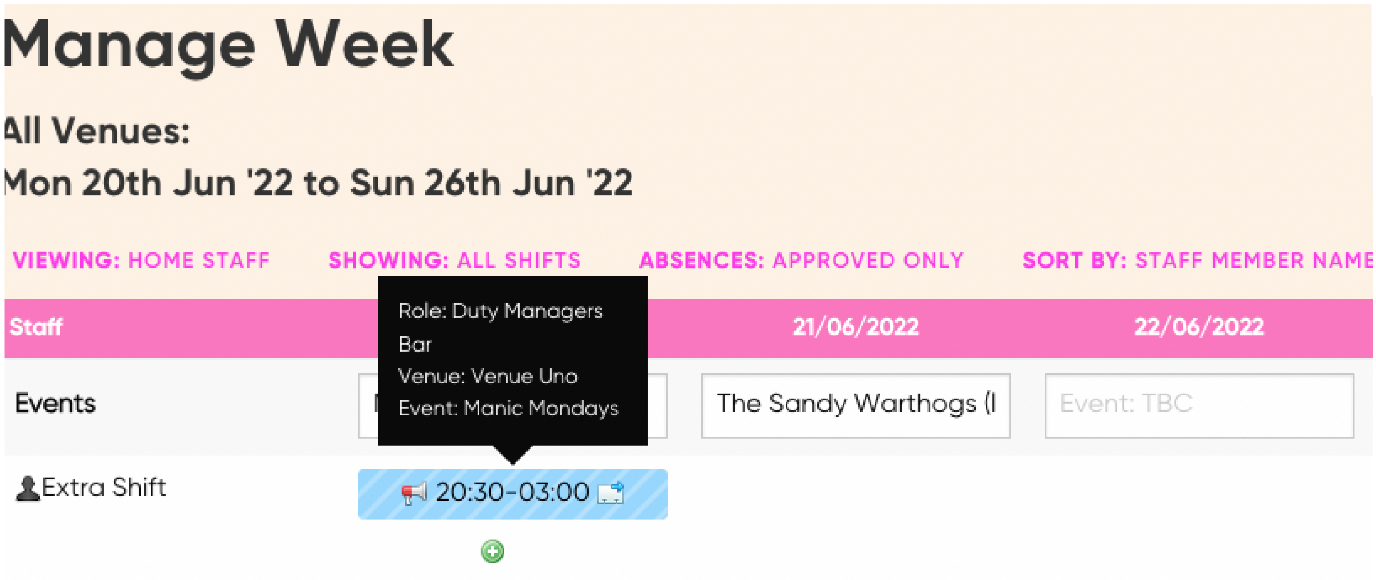
You can set the colour for each venue under the venue settings



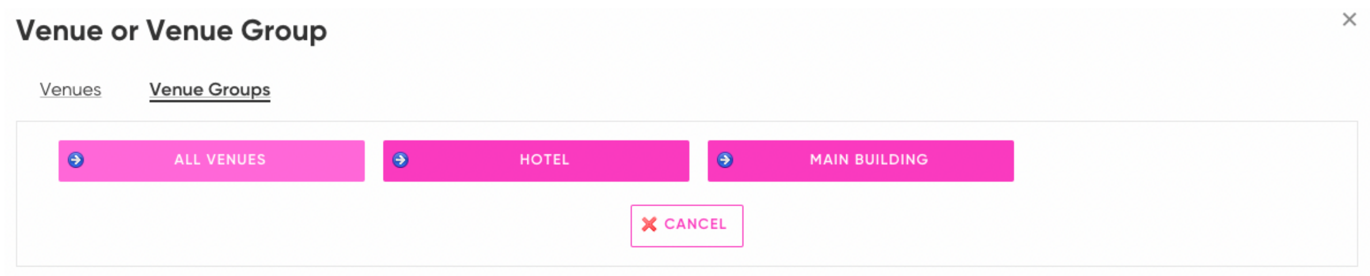

 

## 6.7. Week View Quick Info

You can have quick access to information about the shift when on Week view. When you ‘hover’ over the shift time; roles, venue and events are shown.




‘Venue’ will only come up in quick view info when you are looking at all venues rather than a specific venue. To change to all venues go to Venue Groups > All Venues.

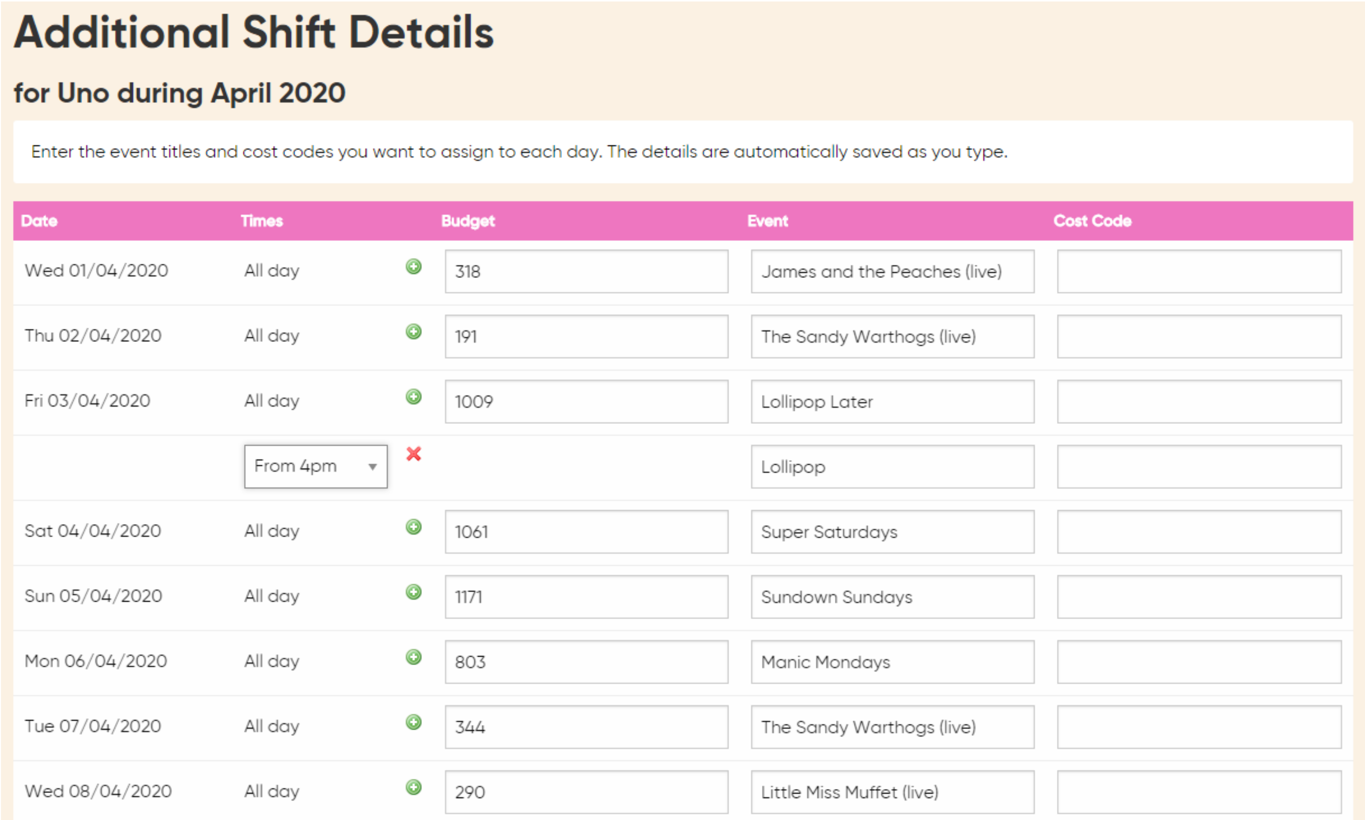



You can navigate to this page via Shifts > Manage Shift Week.

### 6.7.1. Setting Cost Codes & Events in Bulk

You can configure multiple a whole month of cost codes and event titles on one page under Shifts > Shift Settings > Cost Codes & Events.

Within this page, you can also configure multiple codes and events per day.




Each day is listed with the Event and Cost Codes columns; only the columns that you have enabled in your settings will be shown. For example, if you do not use Events then this column will not be shown.

To edit or set a code, simply type it into the box. It will be saved instantly.

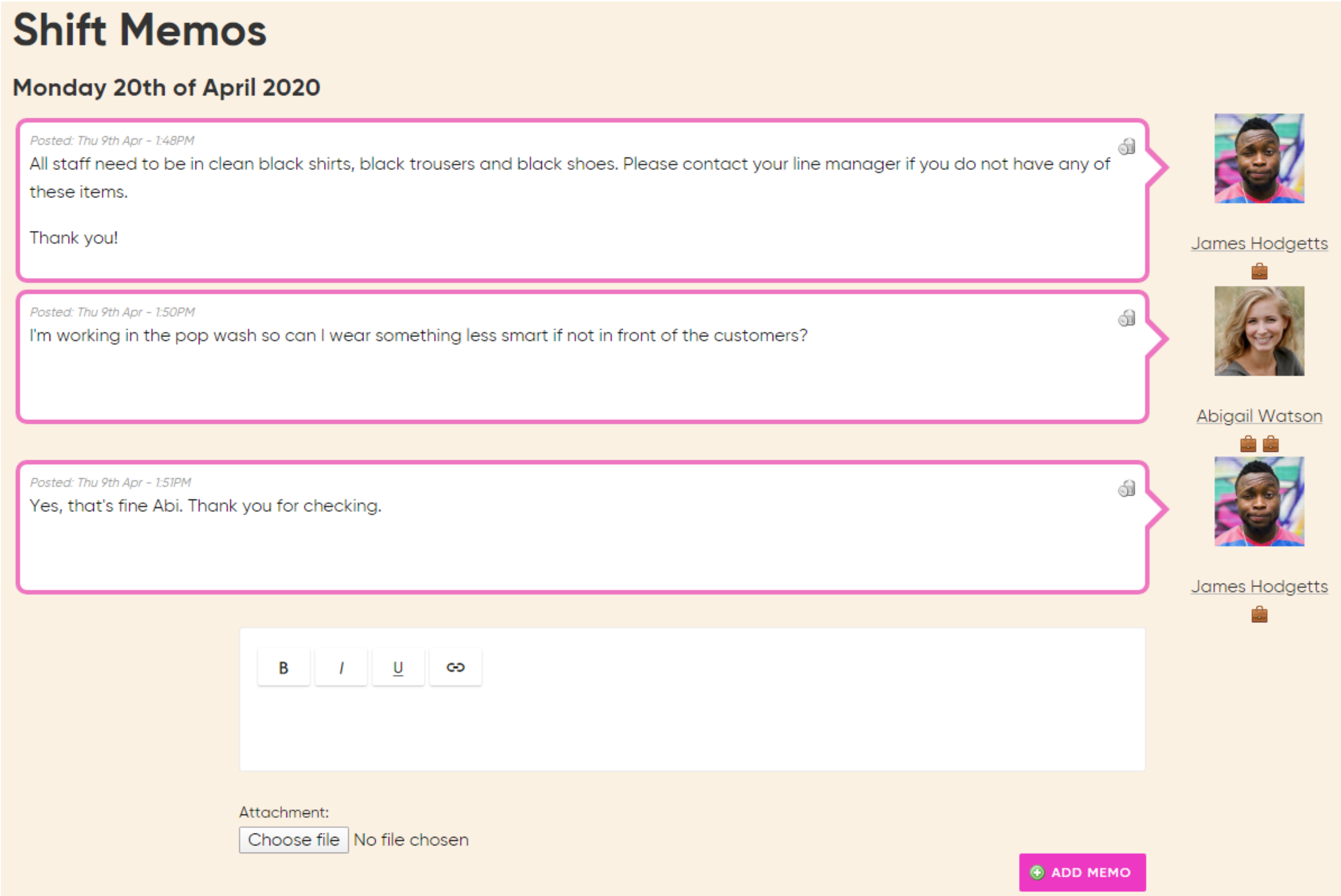
To add additional events or codes on the same day then click the plus icon to add a row with a time drop down. Simply select the time in the drop down for when the new event and cost codes will come into effect.

Any shift that starts after this time will be assigned that event or cost codes. Shifts that start before (even if they finish after) will use the previous settings.

## 6.8. Shift Notes

This provides you with the list of upcoming shifts and if there are any notes attached. These may contain details about the shift, changes, updates, or necessary information. The “Notes” column will show if there is a note attached to the shift and how many replies are present.



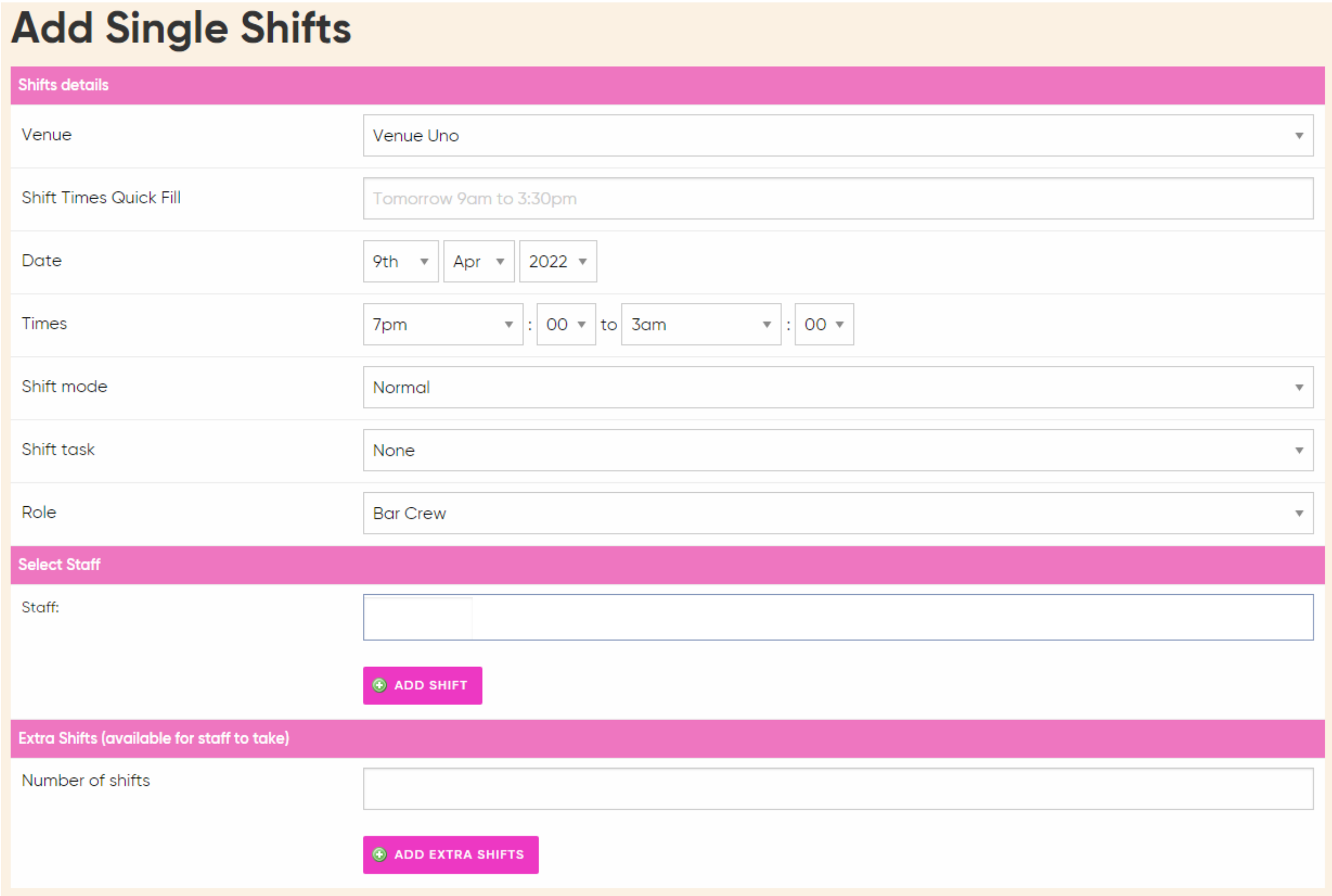

You can click on any shift and add a new note to it. Click the shift date and then enter the note in the message field. You can also add attachments as needed.

You can also reply to any existing notes. You'll see who posted the note and when, as well as being able to remove any of your existing comments or replies. Depending on your permission level, you are also able to delete other staff member's responses if needed.

## 6.9. Creating a Single Shift

You can create a single shift to add to an existing shift or as a new shift entirely.




- **Venue**
  Select the venue where the shift will take place.
- **Shift Times Quick Fill**
  Pick a specific date and time for a shift.
- **Starting/Ending on … at**
  Determine the shift times.
- **Post as**
  Select from the dropdown the appropriate status of the shift (normal, hidden, or locked).
- **Shift mode**
  Select whether you want to allow the shift to be changed or you want the shift to be locked.
- **Shift task**
  Select from the dropdown the appropriate task that needs to be completed during the shift.
- **Role**
  Select from the dropdown the role to create the shift for.
- **Staff**
  Select the staff members to create the shift for. Start typing the staff member's name and as long as they match the role, they will appear. You can add multiple staff members by continuing to type and select names.

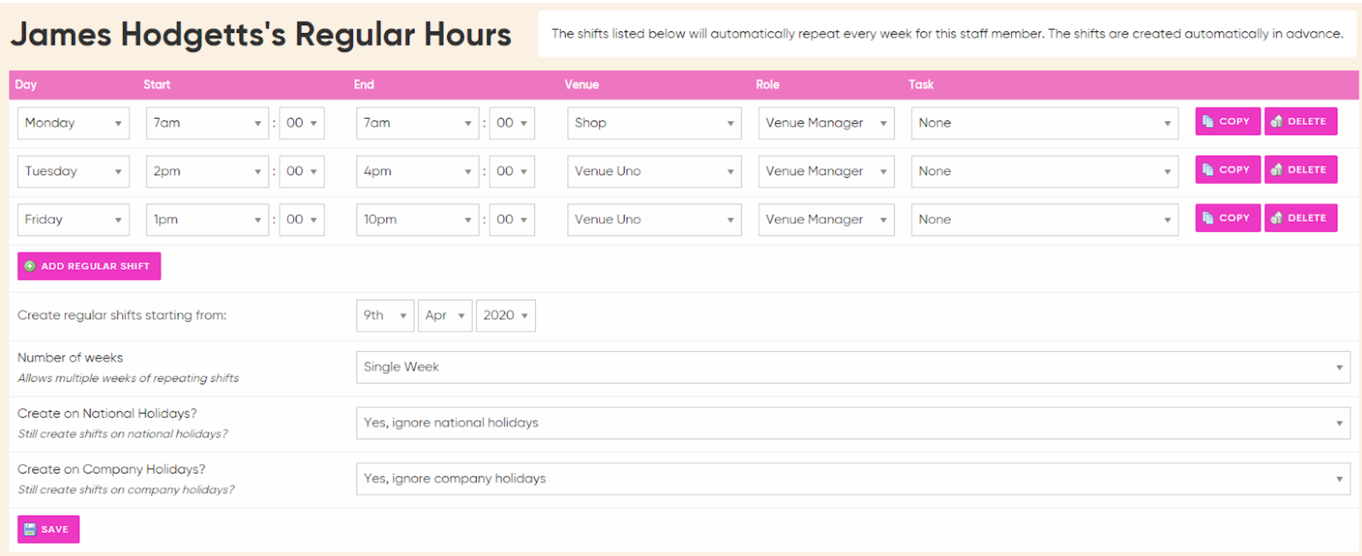
Once you are happy with the information, click “Add Shift”. In the event that you have selected a staff member that is already working, you will be notified. If you have entered multiple people’s names to the staff list, the other members will still be added to the shift even if one or more returns an error.

You can also add extra shifts on the same page; simply enter the number of  extra shifts and click Add Extra Shift.

# 6.10. Staff Member’s Regular Repeating Shifts

Regular Repeating Shifts are shifts that are always assigned to this staff member every week or every rotation of weeks. The system will automatically add these shifts on a rolling basis several months in advance. You can change how many months in advance that the shifts are created in the Global Settings.

Manage the repeating shifts under the Actions menu of the staff member’s profile page.




The shift patterns can be any combination of hours on each given day. You can also set the venue, skill and shift task for each repeating shift.

You can also choose if the pattern of shifts is a single week or multiple different weeks that rotate. Choose how many weeks and a date that will be in week 1 to set this up.


You are also able to configure if the system should take notice of exemption dates (perfect if you are an organisation with term times), create shifts on national holidays and/or organisation holidays.

When saving, you will be asked to confirm a start date for these shifts. The system will then add the shifts from this moment onwards. The system will then continue to add the shifts months in advance. You can see how far in advance the shifts are created under the Global Settings options. You can, if required, also set an end date for the shift pattern. This will limit how long the shifts are created for and is most suitable for fix-term contracts or shift patterns that are reviewed at regular periods.

Note: the shifts should be created far enough in advance that they will cover all holiday requests. Deductions on holiday allowances are made based on the shifts a holiday request affects. If the regular shifts have not yet been created for the holiday request period then no deductions will be made automatically (they can be manually added later).

The start date can also be used if the staff member’s regular shifts are changing on a specific date. Simply enter the change date and the previous pattern up to that date will be maintained. Existing regular shifts after the start date will be removed and new regular shifts added.

## 6.11. Cost Code Management

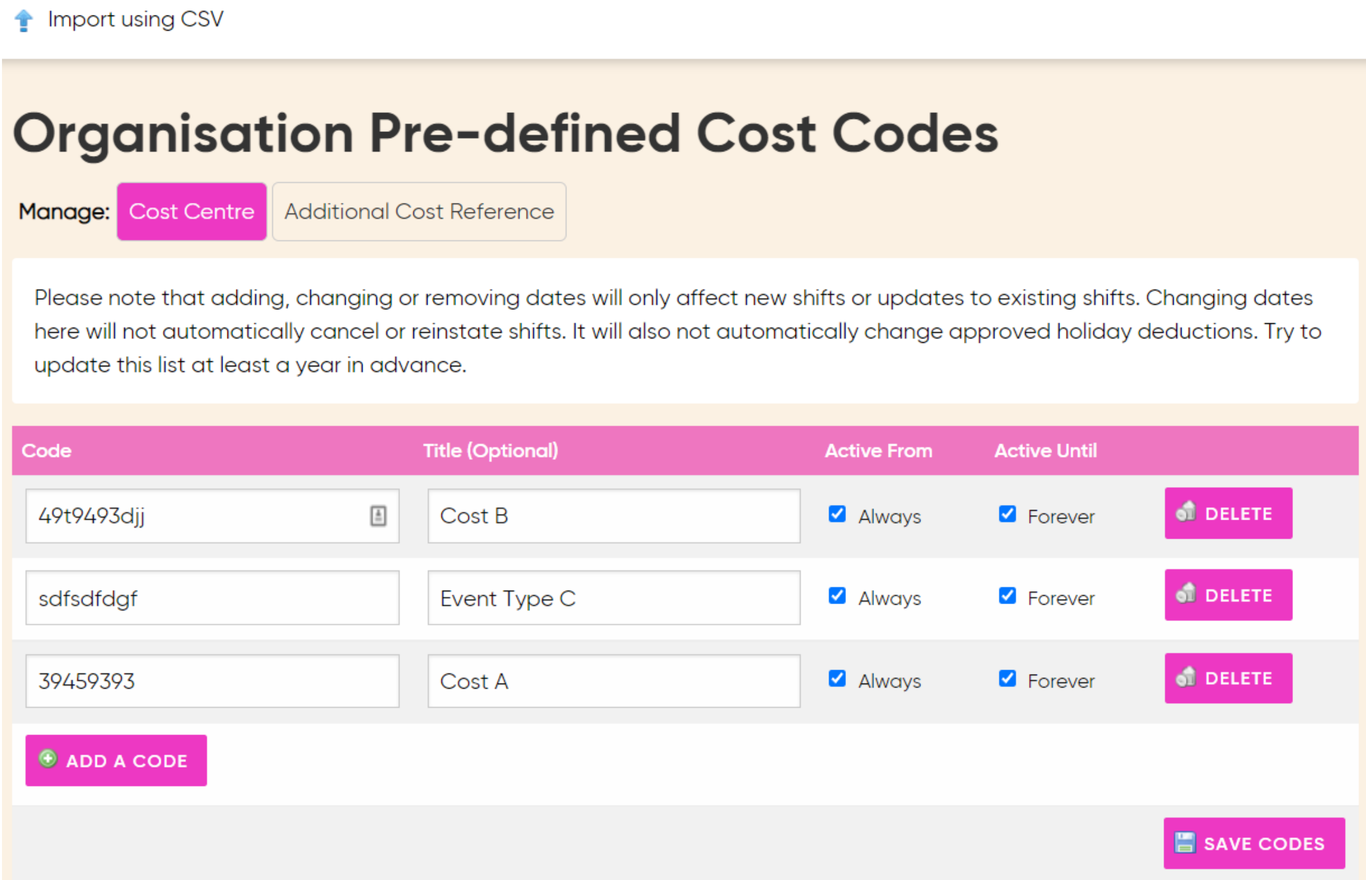
Cost codes are a powerful tool to segment and report on different shifts and time entries using up to four different codes.  Each of the four codes can be used for completely different purposes; e.g. promotor code, cost centre, tax claim code and more. Within each cost code, you can set it to be any value (e.g. type anything you need) or choose a value from a predetermined drop down of options.

The predetermined list of cost codes makes it much easier and less error-prone to manage complex codes. In addition, this option allows for a label to be set along with a different physical code used for reporting. You can also set a “start” and “end” date on each of the codes so they are only available to use for a shift or time entry taking place between those dates (they can only be used for a show during its production run for example).

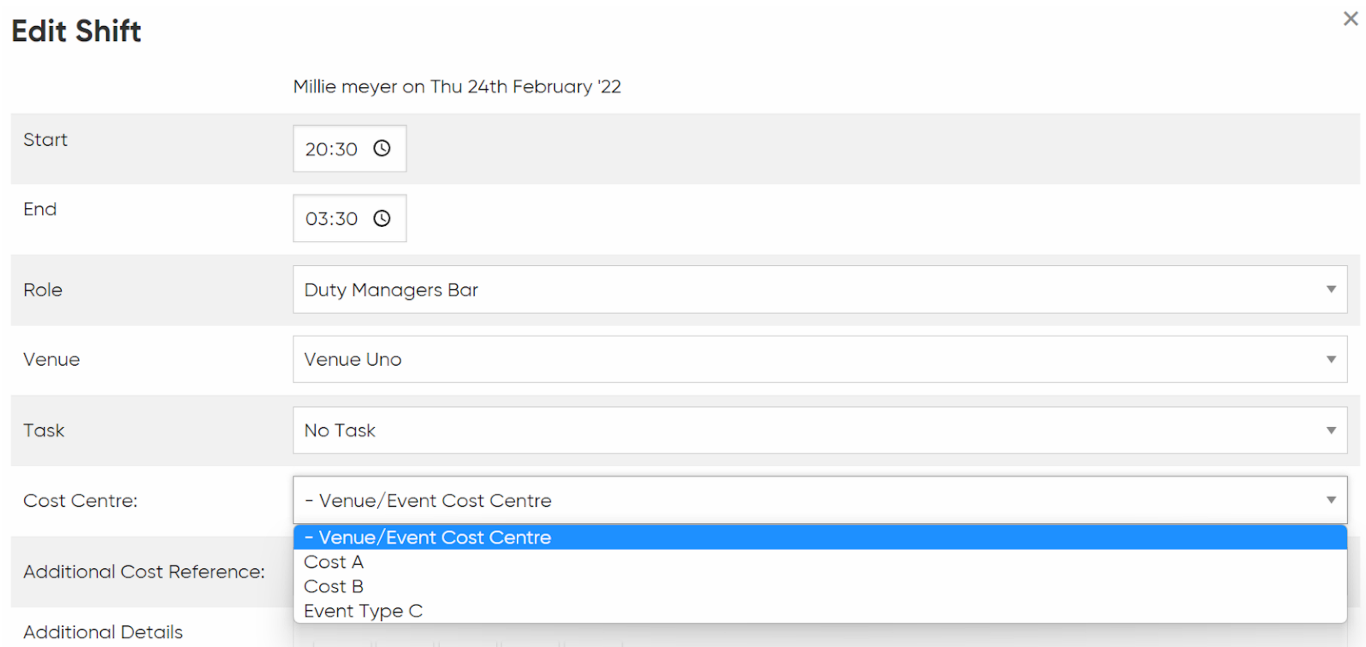
Turn on our cost codes, set their name and choose if cost codes are entered as free-text or from a list under the Cost Code configuration settings in global settings.

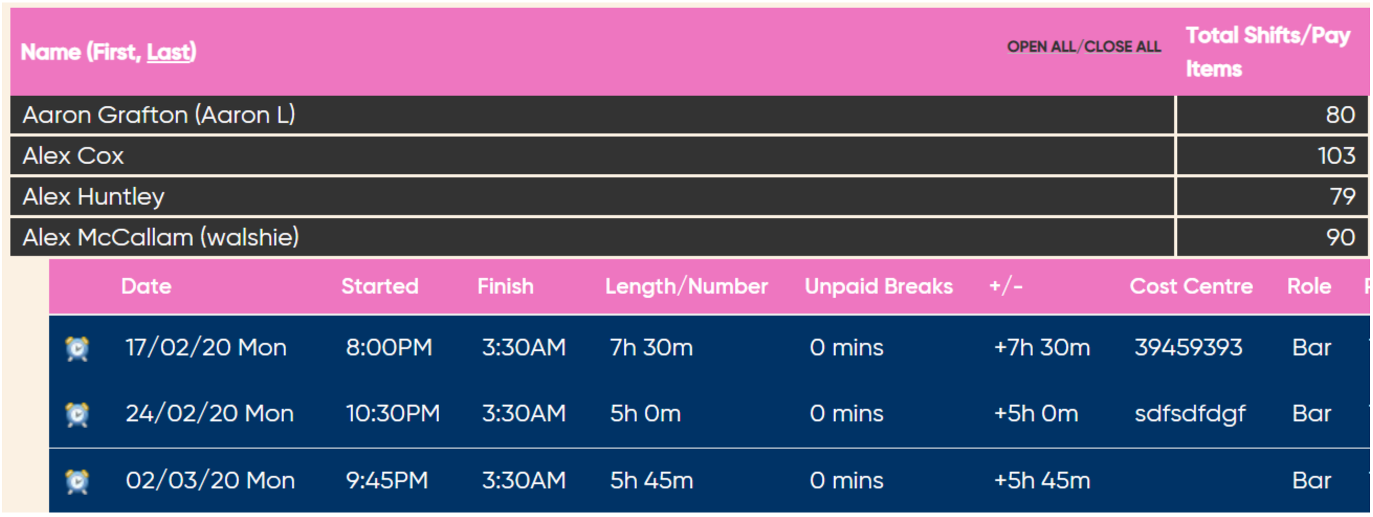
To set up or import the available cost codes, use the Manage Cost Codes under System > Configuration > Manage Cost Codes.




Shifts and time entries can now have cost codes configured directly on them at any time and you can allow staff to set their own cost codes when clocking in or during their shift.




Cost codes are also now able to be displayed on unprocessed pay and printable time sheets.




With predetermined cost codes, you can manually add them or you can use the import format using CSV. This is available using the Import link in the Actions menu on the Manage Cost Codes page. The import page provides a default format you can download to upload back into the system.

Cost codes have their own dedicated report but can also be included within payroll exports and other reports. This can be found under Reports > Time entries & Pay.

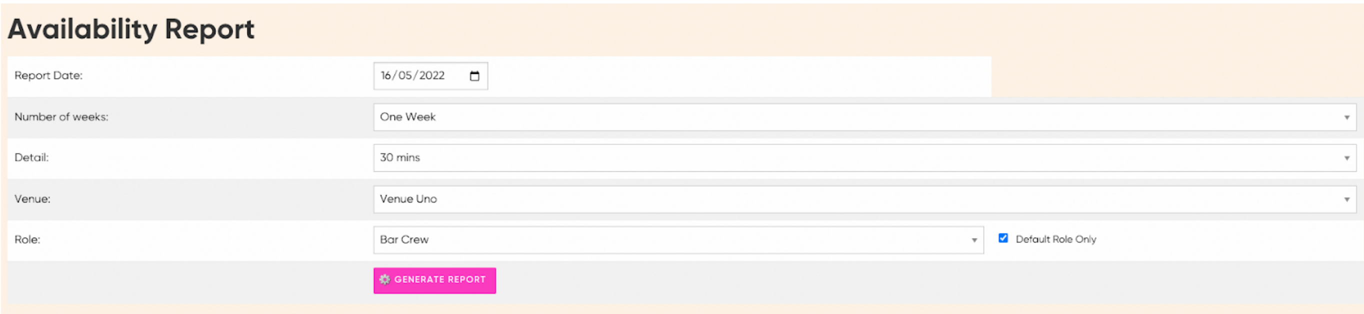
# 6.12. Reports

## 6.12.1. Daily Schedule.

6.12.2. This page provides you with information about the upcoming shift - who is working, their team, any tasks, notes, and the shift times. Using the Actions menu, you can select another shift or a previous shift.

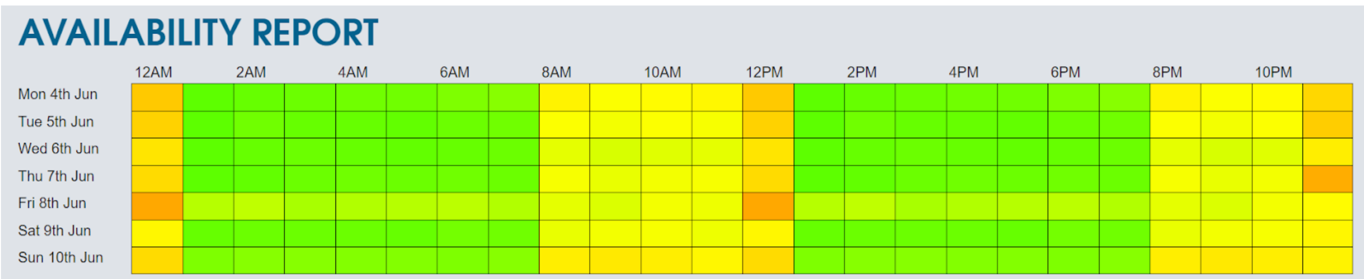
## 6.12.3. Availability Report

This report shows your staff availability in detail down to every 15 minutes for any number of weeks. This can be navigated via Reports > Staff Reports > Staff Availability Map.




From here you can create a report specifying:

- The length of block
- The number of weeks
- The venue you are interested in
- The role you are wanting to fill




The report can show up to 12 weeks at a time and will show availability in a range of colours from green (100% available to red (0% available).

You can hover over each block to see the percentage figure plus the actual number of staff available. The report takes into account holidays, weekly preferences,  employment eligibility expiry dates, role requirements and any other factors that would prevent a staff member from working.

The size of the blocks will be dedicated by your venue settings for staff availability (e.g. if they can set it down to 15 minutes then the report will do that too).

### 6.12.4. Covershift Requests

This provides you with the full list of available covershifts. These are either extra shifts, offered shifts, or shifts that people have requested cover for. This can be found under Shift Reports.

**Cover Requests**

| Date | Venue | Start | End | Role | Staff Member | |
|---|---|---|---|---|---|---|
| Wed 18th of May | Uno | 8:30pm | 3:30am | DM Bar | Millie | SHIFTS DETAILS · GIVE SHIFT · WHO COULD COVER? · EXTERNAL STAFF · NIGHT OFF |
| Fri 20th of May | Uno | 8:30pm | 3:30am | DM Bar | Millie | SHIFTS DETAILS · GIVE SHIFT · WHO COULD COVER? · EXTERNAL STAFF · NIGHT OFF |

To click shift details to see who else is working that day and any shift tasks.

There are 5 actions that you can take:

- **Give Shift:**
  This provides you with a list of staff that are able to work that shift. By selecting a staff member and clicking "Send Shift", they will be alerted via text. A confirmation message will appear to confirm that you have assigned that shift and it will be removed from the list.
- **Who could cover?**
  This provides you with a list of all available staff that could cover the shift. Rather than immediately assigning the shift to a particular person (shown in "Give Shift"), here you are able to contact varying staff members to see if they are happy to cover the shift. If they are, you can then assign the shift to them via "Give Shift".
- **External Staff**
  You are able to give the shift to someone that is not on your staff list, such as someone borrowed from another workplace or someone doing a trial shift. Enter the name of the person that you are giving the shift to and click "Take Shift". The shift will appear in the shift calendar for that date.
- **Cancel**
  You can cancel the covershift if necessary. This is only applicable for extra shifts, unassigned shifts or offered shifts.
- **Night Off**
  You can give a staff member the night off if they have requested cover and you no longer need them to work. The shift will then disappear from their "My Shifts" list.

### 6.12.5. Shifts Off List

This shows the list of untaken shifts off.

If the night off is forced the shift will be assigned to relevant staff members if they are not taken by choice.

If the night off is not forced the night off shift can either be removed or given to relevant staff members.

### 6.12.6. Shift Listings

Here you can select to view a report of the upcoming shifts. You can control the following features in the report:

- 
- **Report Period**
  Select the time period for the shift report, chosen by hours (next 24) days (next 7, 14, or 30), or between a date and time range.
- **Report Options**
  Choose to include untaken extra shifts or hidden shifts in the report.
- **Report Roles**
  Select which roles you'd like included in the report. By default, all roles are selected.

Then click "View Report".

You can now see a quick summary of the upcoming shifts, the staff members, their team, their tasks, and their shift times.

#### 6.12.6.1. View Across Primary Venue Group

This option adds a special permission called "Shifts Schedule Listings Report: primary venue group". This permission automatically adapts the Shift Listing report so it will show all shifts across the staff member's current venue's primary venue group.

For example, you might have a team who work in a part of a building. You do not want them to have access across all venues within the building however you wish for them to be able to view a report that shows them all the staff working in the building.

This permission can be granted to all of the venues assigned to the same primary venue group.

*To use: set primary venue group(s) for the venues you wish to have this access.*
*Grant the "Shifts Schedule Listings Report: primary venue group" permission to the access levels you need.*
*They do not need to have access to all the venues in the venue group; they'll be able to see the shifts across the group but not be able to edit them or view reports.*

# 6.13. Shift Schedule Creation

## 6.13.1. Summary

The schedule creation tool allows you to easily plan and populate shifts using your staff availability and skills to meet your staffing requirements.

Templates contain the times, skills and tasks that you need for that template. They can also contain named individuals or unassigned shifts but the majority of the templates will be for shifts that the schedule creation tool will assign to staff members.

Once you have a template, you use the schedule creation tool to plot your templates onto the calcular. You can repeat templates as many times as you need and you can combine different templates on the same day. For example, you might have a weekday template which is the same every weekday and then also have a Friday afternoon template that you add just on Fridays to give you some extra staff. Both the weekday template and the Friday template will be combined when scheduling that day.

Once this is all scheduled then you will preview the shifts. The system will then attempt to fill your entire schedule with staff based on their skills and availability. You are able to see the shifts and review the template at this stage. If you are happy with the plan then you can convert the preview shifts into real shifts that you can then edit as normal.

You can re-generate the preview shifts as many times as needed and each time might generate different results.

## 6.13.2. Manage Templates

You can create templates for shifts to save time when scheduling your staff members.

### 6.13.2.1. Creating New Templates

To create a new template, click the “Actions” button in the right corner of the menu then select “Create Template”.

There are various options:

- **Template Title**
  What the template will be called.
- **Category**
  This allows you to group the templates together and only view that category.
- **Venue Specific**
  Templates can either be a single venue (e.g. the shifts are created in the venue that the template is added to) or they can be multi-venue (e.g. you choose in the template where the shifts will be worked).
- **Template Owner**
  Where the template should sit for administration purposes.

- **Share Template with other Venues**
  Can other venues use your template in their schedules (useful for single venue templates).
- **Quick Add**
  Choose some of your most common templates that you can then quickly click and add to the schedule directly.

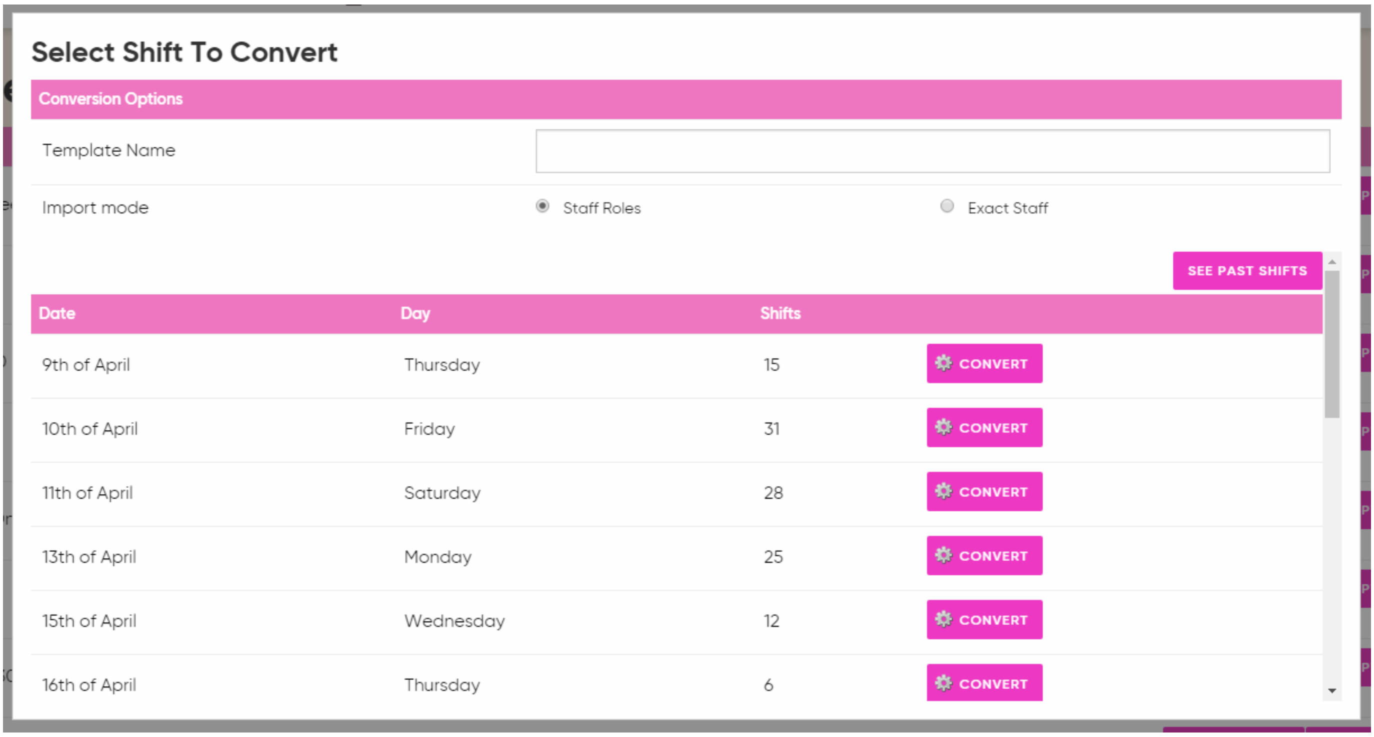
The template will be added to the list. You can either keep the template just for your current venue or allow the template to be shared to other venues.

### 6.13.2.2. Creating New Templates from Shifts

Rather than creating a new template from scratch, you can select to create a template from an existing shift.

Click the "Actions" button in the right corner of the menu then select "Create Template from Shifts".

This shows you a popup that allows you to provide the new template with a name and to select the shift that you would like to convert (to select, click the "Convert" button). You are also able to choose whether you require the staff roles or the exact staff to be imported into the new template.




If you click "Convert" before you give the template a name, it will still be added to the list under the name "(untitled)". Clicking the pencil icon on the template list will allow you to edit the name of the template.

### 6.13.2.3. Managing the Template

To manage your new template, or to adjust an existing template, click "Manage".

- **Populate shifts from role**
  Select whether you want to place "Certain Staff" into the shift or staff who are members of a particular team. "Certain Staff" allows you to select specific staff members to add to the schedule. If you select "Members of …" then those added will be those who have this as their default role.
- **Role for shifts**
  Specify which role you are wanting to fill for the shifts.
- **Staff**
  This will only show if "Certain Staff" have been selected from the "Place Type" dropdown. Here you can select the staff members that you require for the shift.
- **Task**
  Specify which task you want to be undertaken during the shift.
- **Number of Spaces**
  This will only show if "Members of …" has been selected from the "Place Type" dropdown. Select the number of spaces that you want to create from that member list.
- **Role**
  Determine the role that you want to create the space for.
- **Start/End Times**
  Select the shift times.
- **Task**
  Select the appropriate task that needs to be completed during the shift by that role.
- **Fill Options**
  Determine how that role is to be assigned. Equal shift spread is the most common as this will try to provide all staff with an equal number of shifts.

Once you're happy with the information, click "Add to Template". This will then add the information to the bottom of the template.

Keep going until you have completed your template as needed. Within the template table, you will see the details of the shifts as you have added them:

| Staff Member / Fill From Role | Shift Role | Start | End | Task | D.R | Split | Fill Method | | |
|---|---|---|---|---|---|---|---|---|---|
| 2 x Duty Managers Bar | DM Bar | 8:00PM | 3:30AM | | ✔ | ✖ | Equal Shift Spread | | |
| 2 x Duty Managers Bar | DM Bar | 3:30AM | 4:30AM | | | | | | |

- **Staff Member/Fill From Role**
  Where should the staff come from to fill this requirement. This might also state extra shifts, unassigned shifts or offered shifts; these all mean they will not be populated with specific people)
- **Shift Role**
  The role that the shift will be.

- **Venue (if a multi-venue template)**
  Where the shift should be worked. If this is not shown or it's set to [schedule venue] then this is where the template has been added to the scheduler.
- **Task**
  Shift task (if assigned). You can edit this using the select boxes on the right and the bulk update options below the table.
- **D.R.**
  Default Role Only. When enabled (which is the default) then only staff who have the 'fill from role' as their default role will be used. This means that supervisors who might have both the supervisor role and non-supervisor role will not be placed into the non-supervisor role.
  You also have the option to prioritise the staff who are available with the role as their default but if you run out then use any available staff who can work in that role.
- **Split**
  Enabling this option will tell the system to fill the requirement with multiple people based on the shift splitting rules (under your Venue Settings) and who is available to work. It allows for a long requirement to be entered and the system allocates them between different staff.
- **Fill Method**
  Determine how that role is to be assigned. Equal shift spread is the most common as this will try to provide all staff with an equal number of shifts.
  - **Random**
    This will use a completely random order to choose who should work each shift. This will not provide any equal allocation or fair schedules. It's suitable to add an element of randomness into a schedule that is very repetitive. In these cases, use it on one or two rows of a template to add the random element.
  - **Least Upcoming Shifts**
    The staff who have the least shifts scheduled in the future will be assigned first. This won't look at the number of hours, just the number of shifts.
  - **Equal Shift Spread**
    This will look at the number of hours working for the last few weeks and into the future. The system will then try to allocate the same amount of hours to all staff. This is the most common and most useful method.
  - **Most Shifts Worked**
    The staff who have completed the fewest shifts over the last few weeks will be assigned first.
  - **Least Shifts Worked**
    The staff who have completed the fewest shifts over the last few weeks will be assigned first.
  - **String of Similar Shifts**
    This will prioritise the staff who worked the same shift (role and times) the previous day. This is intended to help staff have a series of shifts at the same time before changing; e.g. a string of 4 nights before changing back to days. This should be used along with a Contract Restriction to prevent too many shifts being worked in a row.
  - **Alphabetical (A-Z)**
    Work down the list of staff alphabetically.

- **Alphabetical (Z-A)**
  Work up the list of staff alphabetically.
- **Alphabetical Alt. (A-Z)**
  Work down the list alphabetically, skip every other staff member. Then return and go through all of the skipped staff members. This is useful to mix teams up who often use the Alphabetical option.
- **Alphabetical Alt. (Z-A)**
  Work up the list alphabetically, skip every other staff member. Then return and go through all of the skipped staff members.

- **Linked Shifts**
  The chain icon allows you to add a linked shift. Linked shifts must always be worked by the same staff member so it keeps them together throughout the scheduling process and any future shift swapping/transfers. Read more about Linked Shifts.

To make any changes to the existing schedule, check the checkbox in the row of the staff member or role that you would like to change and use the box at the bottom to adjust the start and end times, roles, and tasks, then click "Change".

### 6.13.2.4. DR (Default Role)

DR stands for Default Role. This is an additional refinement on which staff should be used to populate the shift. With this checked, only staff that have the fill from role set as their default role. So only the staff who primarily work in this role rather than any staff member with the role assigned.

When disabled, the system will use any staff member with the fill from the role assigned.

This also has an additional mode which is shown as a green tick with a plus ( ). In this mode, the schedule tool will assign default role members first. If none are available then it will expand to include all members of that role.

### 6.13.2.5. Automatic Split Options

The split option allows the system to split the set shift times into smaller shifts around staff availability. The settings for how the shifts are split are contained on the Venue Settings page and there you can set max & min lengths for the shifts. StaffSavvy will use the requirements in the split shifts to give out the shifts to the staff who need them most based on the fill method.

The split up option finds a staff member for the first part of the shift (based on your priority to receive shifts) and then increases the length of shift up to the maximum duration.
It is very good at providing lots of staff with different shifts and ensuring staff all receive their hours. However, by its nature, it encourages shifts to be split between multiple staff members.

The split down option allows the system to try and assign the whole shift to a single staff member and only split the shift if they cannot complete the whole shift. In this instance, the shift will be split at the point in time they can't continue to work or at the time that means each part of the shift is at least the minimum length. The system will then search for someone to fill the remaining shift and only split it further if no one can work the remaining portion.
It's much more suited to trying to fill the shift with the same staff member and only splitting it further if no one is available.

| END | TASK | D.R | SPLIT | FILL METHOD |
|---|---|---|---|---|
| 11:30PM | | ✓ | ✗ | Equal Shift Spread |
| 11:30PM | | ✓ | ↑ | Equal Shift Spread |
| 11:30PM | | ✗ | ↓ | Equal Shift Spread |
| 11:30PM | | ✓ | ↑ | Equal Shift Spread |
| 11:30PM | | ✗ | ↑ | Equal Shift Spread |
| 11:30PM | | ✓ | ↓ | Equal Shift Spread |

The split option will create different shift combinations to fill the overall staff requirement.

### 6.13.3. Manage Schedule

This is where you can add the templates previously created to a schedule. This is under Shifts > Schedule Creation > Manage Schedule. These templates can be repeated on an ongoing basis, determined by the number of days or weeks until a certain date. The templates can also be used without repeating for special or irregular events.

At the top of the page, select the template, date, repeat pattern, and repeat until date and then click "Add". These will then show in the calendar below. More than one template can be added to a particular day, allowing you to build up staffing as needed.

If your templates have been set to "Quick Add" then you can hover over the day to see a green + icon. Clicking on this will allow you to access the quick templates.


You can choose either to schedule each venue separately or you can use the Venue Groups to manage multiple venues at once. Use the action menu to choose the ops group to manage.

If required, you can clear all templates from your schedule under the Actions menu on the month view. This allows you to start afresh.

### 6.13.3.1. Calendar View

This is the default view and will show you the given month in a calendar view.

You can view Event titles and cost codes on this page by using the options on the right.

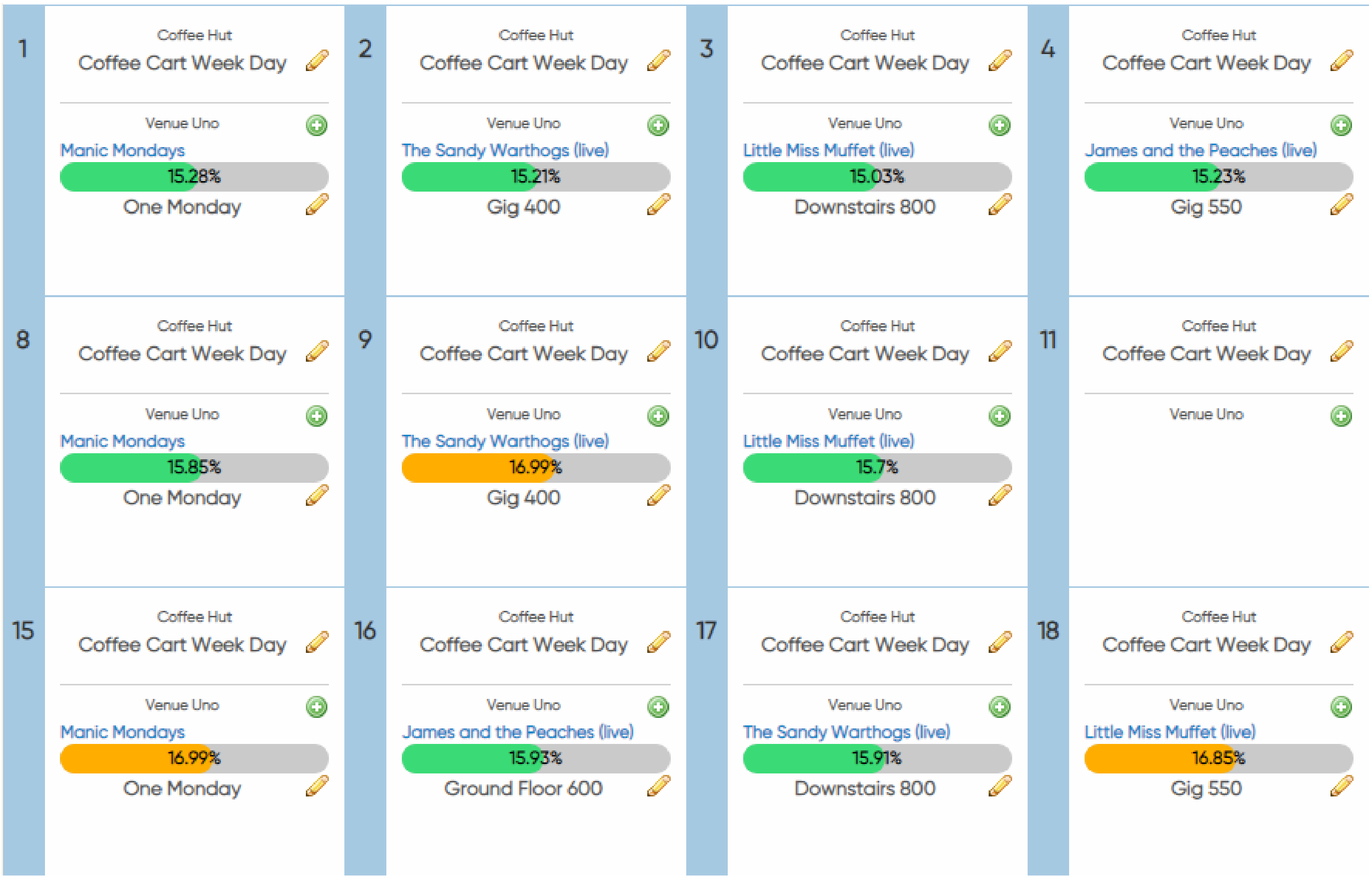
It displays the templates that are assigned to each day of the month. You can click the X to remove them from the template and click the title of the template to go straight to the template to edit it.

The system will also check and warn of problems in the templates used. The warnings are displayed as red exclamation marks next to the templates affected. Hover over the icons to see the reason.

If you are viewing a venue group of values then each venue will be listed and the templates shown for those assigned that day. Event titles and cost codes can be turned on and off from the top right of the page.

StaffSavvy



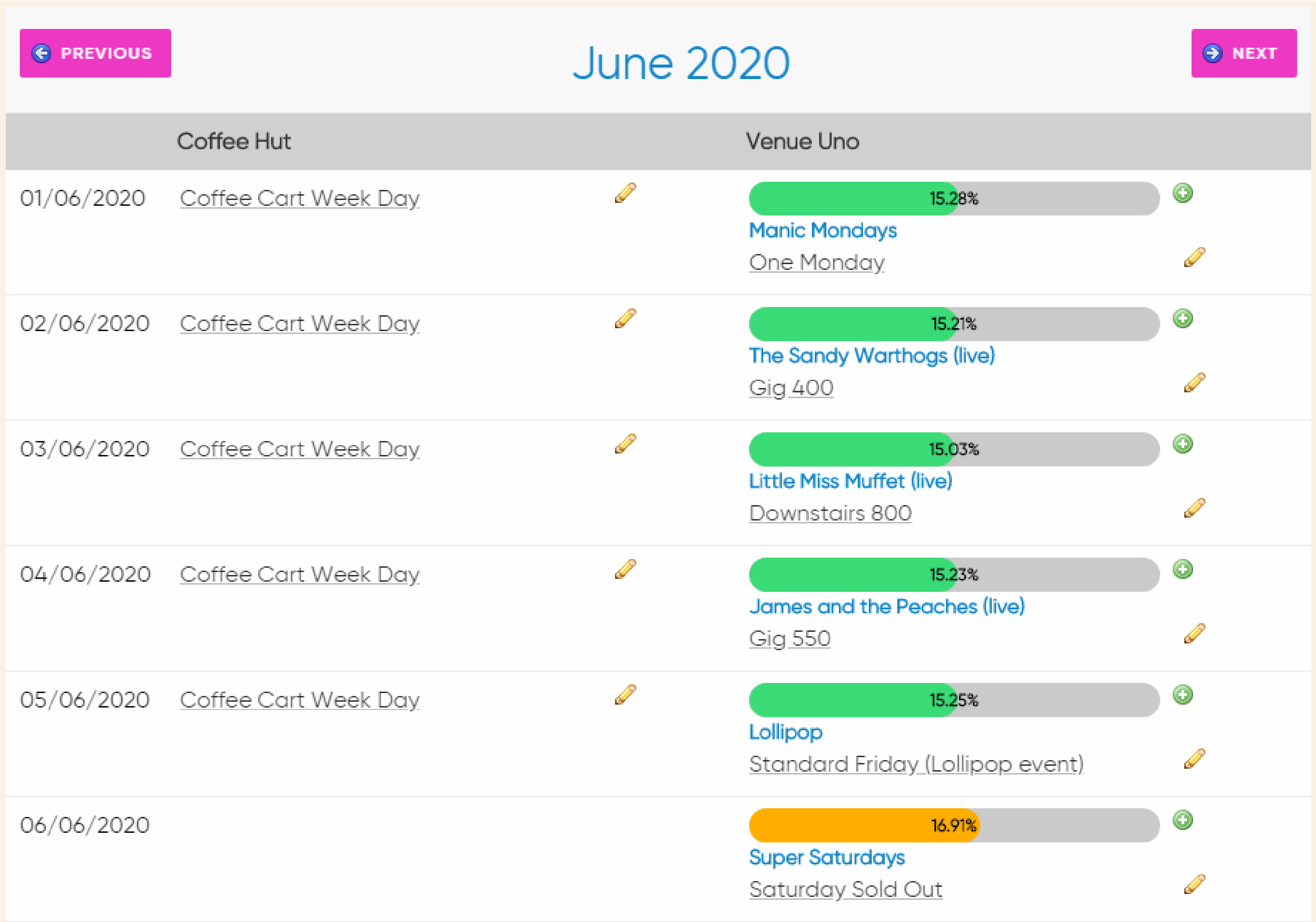

### 6.13.3.2. List View

Use the button on the left above the calendar to change to the List View.

This view is ideal to see further details about the templates or to view multiple venues at the same time. Each venue will be displayed across the top of the page.

Like the calendar view, you can toggle the display of the Event titles and cost codes using the options on the right of the page.

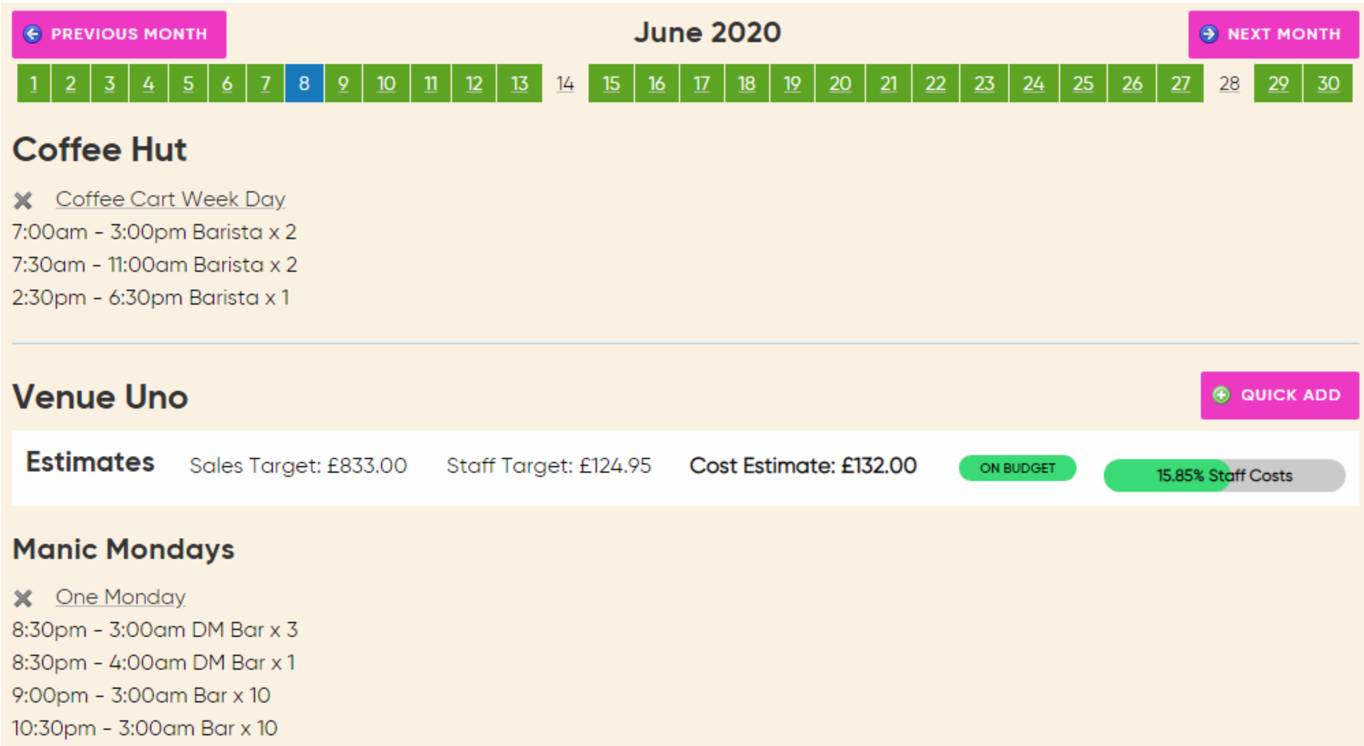
You are also able to enable a template details option. This will show a summary of the role requirements by shift times. It makes it easy to see how the day is scheduled.




### 6.13.3.3. Day View

Use the button on the left above the calendar to change to the Day View. This will show the templates across the venue/venue groups for a single day.



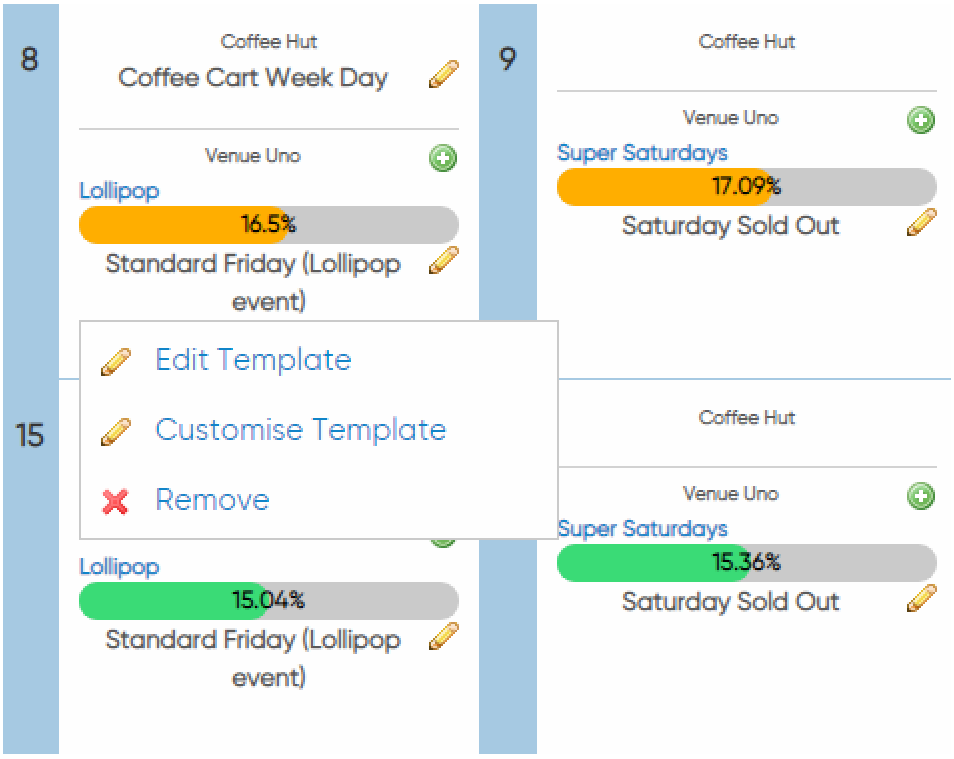

You can choose which day to view within the month at the top. Days in green have templates assigned to them. Days in red have event information added but no templates yet assigned.

The view allows for detailed budget information to be shown along with detailed event details if provided.

### 6.13.3.4. Customised Templates

If required, you can bespoke a template for a single use. This allows you to make adjustments to times or skills for one-off instance instead of creating a completely different template that you won't use again.

To set this up, simply click on the template title on the calendar page or list page. You will see the option to bespoke the template.

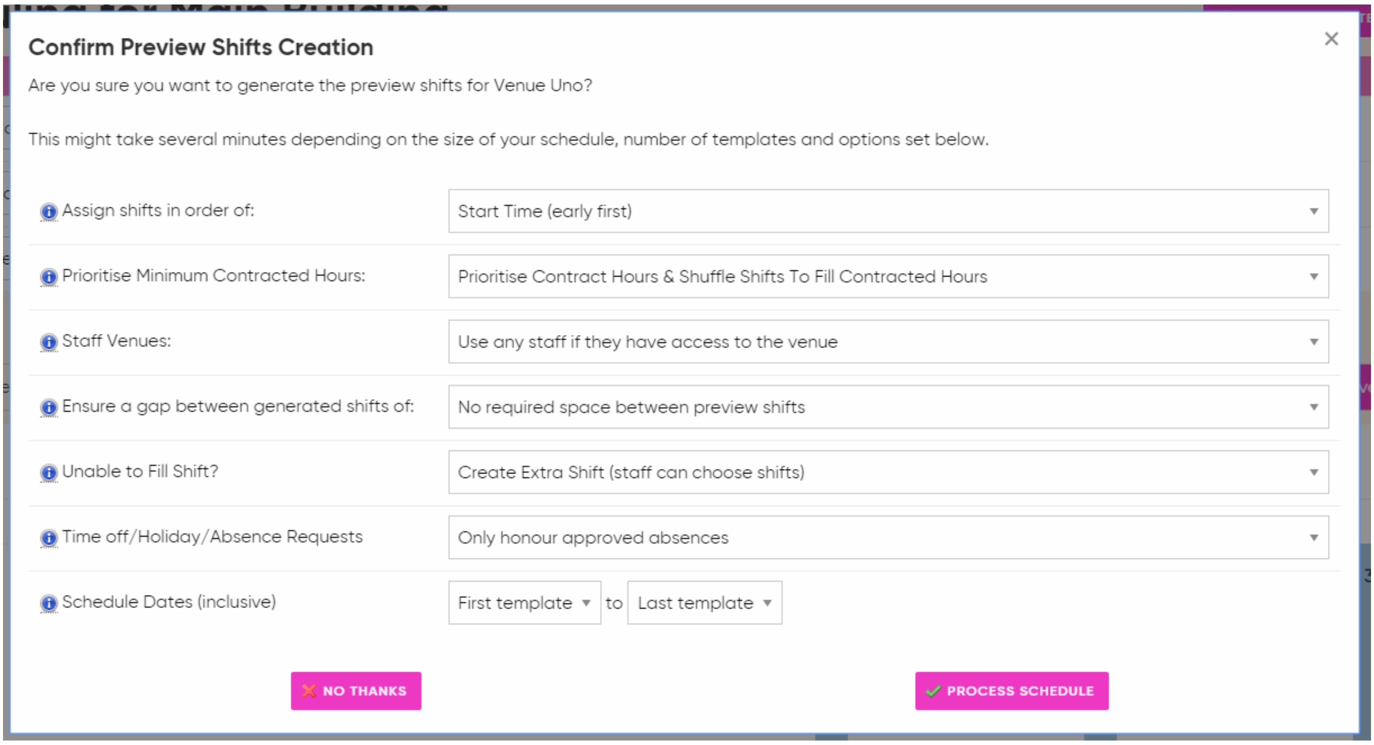



This bespoke template will automatically be deleted when it's no longer needed. You can convert the bespoke template to a real template (so it's always available) but do this before the preview shifts are converted as the bespoke templates will be deleted once the shifts have been converted.

### 6.13.4. Preview Shifts

Once you've determined your schedule, you can preview the upcoming shifts. Click the "Actions" button in the right corner of the menu and select "Create Preview Shifts".




Before the shifts are created to be previewed, you will be asked to confirm a few options.

- **Assigning Shift Order**
    - **Start Time (Early First)**
      This option is the default and is the original method. This will assign shifts in the order they will appear on the schedule. This means any unassigned shifts are more likely at the end of the day (as the early shifts are filled first).
    - **Start Time (Late First)**
      This will assign shifts in reverse order to how they appear on the schedule. This means any unassigned shifts are more likely at the start of the day (as the later shifts are filled first).
    - **Skill/Role Order**
      This order will use the order of skills/roles that you have configured when creating and editing the skills/roles. This allows you to populate some skills/roles first regardless of when the shift will take place.
    - **Week days first**
      This will assign shifts for Mondays to Fridays first before assigning shifts for Saturday and Sunday. This means you are more likely to successfully fill shifts mid-week. It's useful if you have more staff available on weekends as it will ensure those who can work mid-week are assigned first.
    - **Weekends First**
      This will assign shifts for Saturday and Sunday first before assigning shifts for Mondays to Fridays. This means you are more likely to successfully fill shifts during the weekend. It's useful if you have more staff available on week days as it will ensure those who can work weekends are

assigned first.

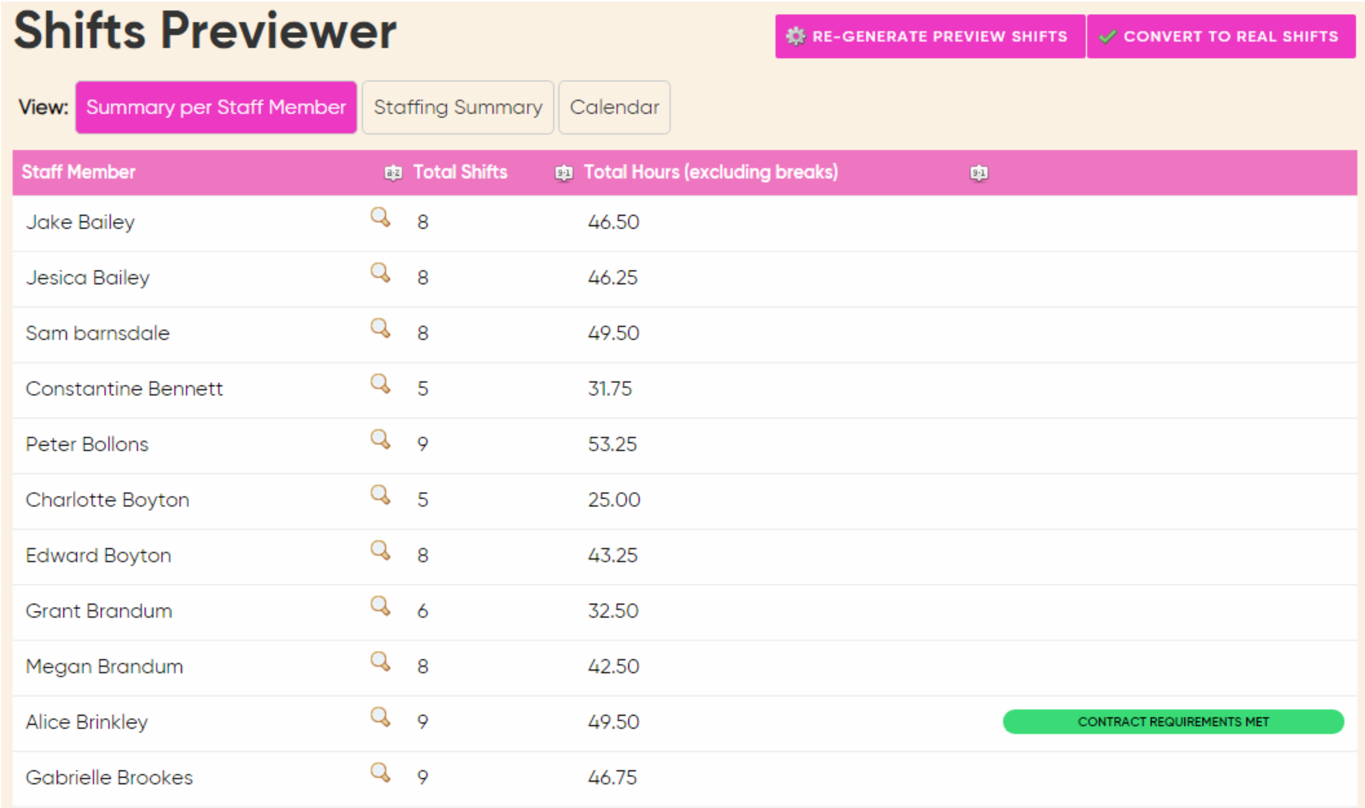
- **Prioritise Minimum Contracted Hours**
  When enabled, this will temporarily ignore your fill options when creating a shift schedule. It will automatically review all staff members eligible to work each shift in the schedule. If a staff member has not yet been assigned the minimum hours then the system will attempt to assign them to that shift. Restrictions such as holiday, weekly preferences, role requirements and other shifts might prevent them from being assigned but they will remain a priority until their contracted hours are met.
  Once all minimum contracted hours are met then the shifts will be assigned based on the fill options set on the template.
  This option can also enable Shift Shuffling.
- **Gap between shifts**
  This is an additional option on top of any contracted rest periods that allows you to force the schedule logic to provide additional spaces between shifts. This is useful to prevent staff working in two places within one day for example.
  Note: this is only for the purposes of scheduling the shifts in this tool. It won't prevent staff from taking shifts. You will need contract restrictions to enforce that rule.
- **Unable to Fill Shift**
  What should the system do if it cannot find a staff member to work a shift? It can simply ignore it (and tell you), create extra shifts (which will be available for staff to take themselves), create offered shifts (staff offer to work it and managers make the final decision) or create unassigned shifts (which you need to allocate manually).
- **Schedule Dates**
  This allows you to only generate part of the schedule. It's perfect if you have scheduled several weeks or months but you want to only generate part of it at the moment. You can always generate the remaining scheduled templates later.

If you are happy to, click "Process Schedule". You will be asked to confirm whether you would like to generate the preview at this time - as it can take some time to load.

A confirmation message will appear saying how many shifts have been created and if there were any issues in the creation of the preview. Click "Display Issues" to see more information here.

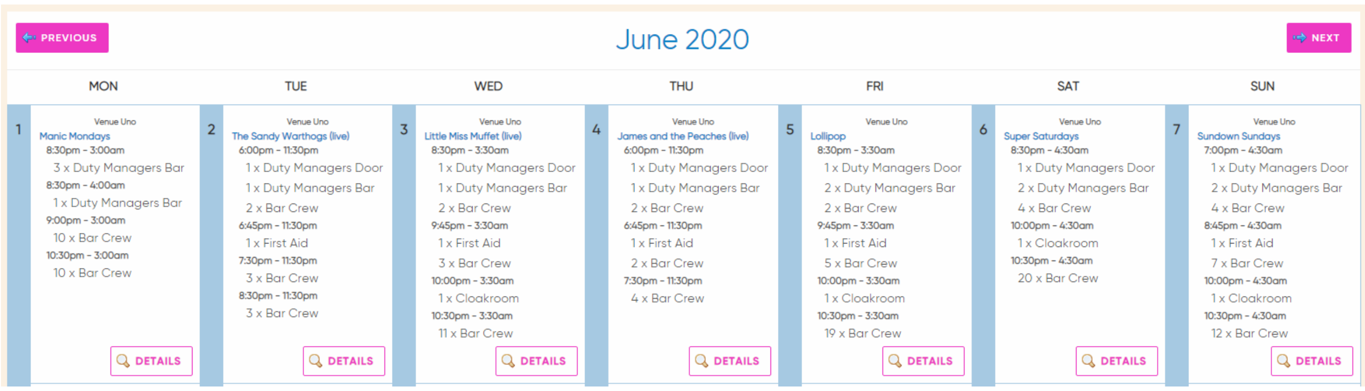
Click "View Preview" to view the new shifts. In the Summary view, this shows you the number of shifts that have been created for staff members and their total hours to be worked.




| Staff Member | Total Shifts | Total Hours (excluding breaks) | |
|---|---|---|---|
| Jake Bailey | 8 | 46.50 | |
| Jesica Bailey | 8 | 46.25 | |
| Sam barnsdale | 8 | 49.50 | |
| Constantine Bennett | 5 | 31.75 | |
| Peter Bollons | 9 | 53.25 | |
| Charlotte Boyton | 5 | 25.00 | |
| Edward Boyton | 8 | 43.25 | |
| Grant Brandum | 6 | 32.50 | |
| Megan Brandum | 8 | 42.50 | |
| Alice Brinkley | 9 | 49.50 | CONTRACT REQUIREMENTS MET |
| Gabrielle Brookes | 9 | 46.75 | |

The calendar view shows you how many shifts have been assigned to which days. Clicking on the Details link on any day will show you the shift summary for that day.



Shift summary for Thu 4th Jun 2020

| Venue | | Staff Member | Role | Task | Start | End | Duration |
|---|---|---|---|---|---|---|---|
| Uno | | Charlie Gilfoy | Bar Crew | | 6:00PM | 11:30PM | 5h 30m |
| Uno | | Megan Green | Bar Crew | | 6:00PM | 11:30PM | 5h 30m |
| Uno | | Sam howes | Duty Managers Door | | 6:00PM | 11:30PM | 5h 30m |
| Uno | | Lana Nicole Serghides | Duty Managers Bar | | 6:00PM | 11:30PM | 5h 30m |
| Uno | | Tara Connell | Bar Crew | | 7:30PM | 11:30PM | 4h 0m |
| Uno | | James Nicholls | Bar Crew | | 7:30PM | 11:30PM | 4h 0m |
| Uno | | Elizabeth Collins | Bar Crew | | 7:30PM | 11:30PM | 4h 0m |
| Uno | | Jake Bailey | Bar Crew | | 7:30PM | 11:30PM | 4h 0m |
| Uno | | Elizabeth Twist | Bar Crew | | 6:45PM | 11:30PM | 4h 45m |
| Uno | | Hannah Serghides | Bar Crew | | 6:45PM | 11:30PM | 4h 45m |
| Uno | | Eloise Weighill | First Aid | | 6:45PM | 11:30PM | 4h 45m |

If you are happy about the shifts (staff, hours, etc.) then click the “Actions” button in the corner of the menu and select “Convert Shifts to Real Shifts”. You can confirm whether you are happy to publish the schedule, and whether shift swapping is allowed (normal or locked shifts) and whether you want to hide the shifts for now.

Once happy with the information, click “Process shifts”. This will then add all of the preview shifts into the main shift management pages; Manage Shifts and Manage Shift Week.

### 6.13.4.1. Shift Shuffling

The system will attempt to assign all shifts in sequence. If the prioritise Meeting Contracted Hours setting is enabled, a special sequence will then be performed. The system will review if any staff members are under their contracted hours. For each of these staff members, the system then views if there are any shifts they can take from staff who have been assigned more hours than they need. When this is the case, the shift will be moved to the staff member who has not received enough hours. This process is called shuffling. It is designed to mimic the manual actions managers often do once they have created the first draft of a schedule. Once all shifts have been assigned then it is easier to see which staff can give up some shifts to others to ensure minimum contracted hours are met.

These two tools should ensure that, whenever possible, staff are assigned their minimum number of hours. There are still limitations that we cannot override such as availability, availability of shifts and staff roles plus existing shifts and restrictions on working hours.

#### 6.13.4.2. Identifying Reasons for Unfilled Shifts

The system can provide a detailed list of all staff who have the roles assigned to work a shift but cannot be assigned the shift for a particular reason.

Open up the list of unassigned/extra shifts on the preview shifts page.

Next to each shift will be a button titled Why. This will bring up the list of the staff with the right roles and access to the venue. Next to each staff member will be a red or orange bar with the reason the staff member can't be assigned a shift.

Orange bars mean the staff member could accept the shift once the schedule is published (the schedule tool might not be able to assign it automatically). Red bars mean they would not be able to accept the shift once published either.

## 6.14. New Shift Emails / Publishing Shifts

New Shift Emails make it easier to ensure your staff are informed of all shifts and updates to shifts in a timely manner without receiving lots of emails from you.

There are several modes to consider. These are configured for each venue separately to allow complete control. It is the first option under the Shift Configuration tab when editing your venue.

- **No new shift email sent; updates always sent**
  This is the default and what happened prior to this update. New shifts are added but no email is sent to the staff member. Any updates to the shift (changes in times etc) are sent via email instantly.
- **Send an email immediately for every single shift added**
  This option will email staff with their shifts as soon as they have been assigned out. This has limitations around hidden shifts and can cause a lot of emails to be sent to staff. It is not recommended.
- **Send a new shift notification email manually when you are ready**
  This option allows you to send emails at the click of a button and is useful if you schedule shifts for long periods (months) at a time. This is not as intelligent as the final option as shifts added and emails not sent means staff could not receive emails for the shift.
  The option to send new shift emails is displayed on the Manage Shifts or Manage Shift Week pages in the actions bar.
- **Automatically send on a schedule**
  This is the recommended option. It will automatically email all of your staff with their shifts on a schedule and will include existing and new shifts in the same email. It can also automatically unhide your

shifts so you can prepare a schedule of templates in advance and know it will be published automatically on schedule. As this option also knows when the next email will be sent, any shifts that take place before the next scheduled email will be sent to the staff member immediately. This ensures your staff always know their schedule. Any venues that share the same email schedule (e.g. both send on a Monday) then the emails will be combined for the staff so they receive one email from the system.

### 6.14.1. Scheduled Email Options

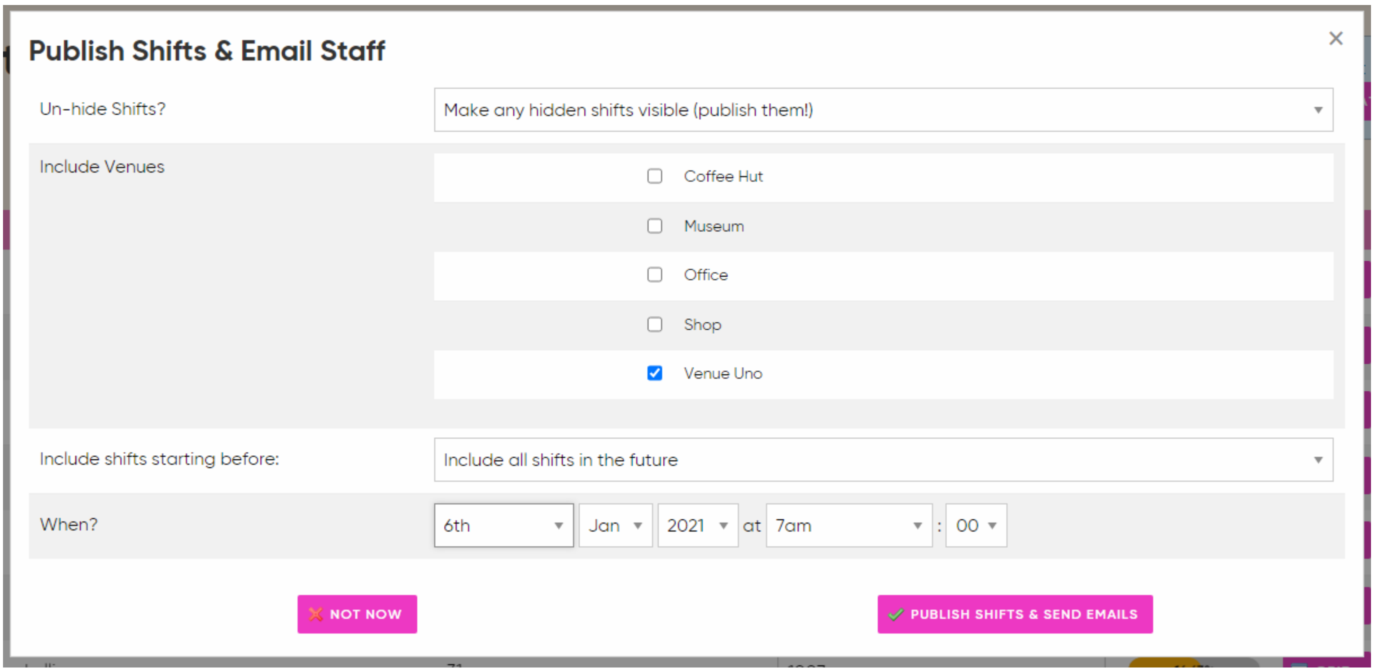
There are lots of different schedule options to choose which day the emails should be sent out. Note that the emails will be sent between 2am and 7am on this day.

We recommend setting the schedule to the day after you finish your schedule. This will ensure you have finished any final adjustments before the emails are sent.

### 6.14.2. Sending Shift Notifications Manually (publishing shifts)

In addition to allowing the system to schedule your shift notification, you can choose to do this manually. Under Shifts > Manage Shifts or Manage Shift Week, simply choose the Publish Shifts (Send Notifications) option in the actions menu.

This will display a popup to confirm your options:



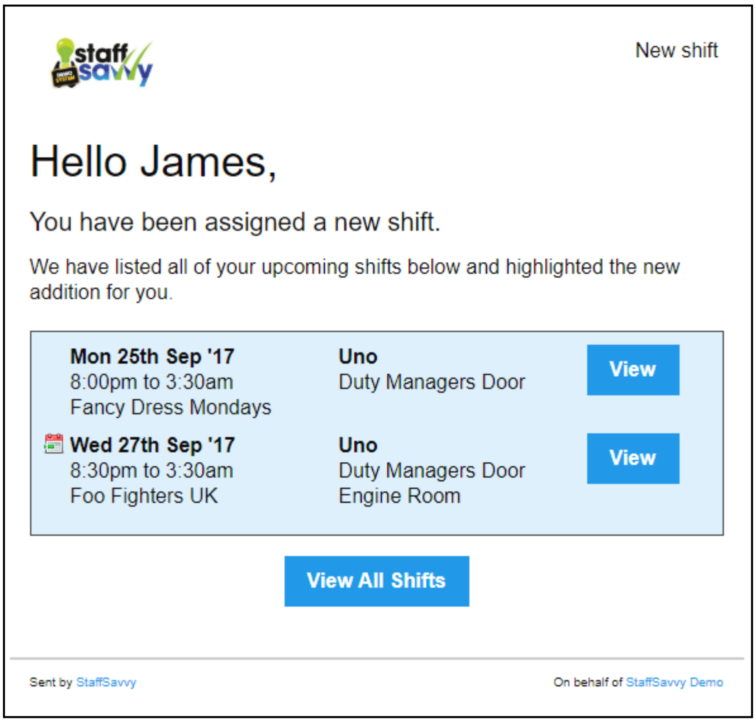

The options include scheduling multiple venues at the same time, setting a limit for shifts to be published (e.g. only publish the next week) and finally an option to set when they should be published. This defaults to publishing straight away but you can choose a date and time in the future for your action to be completed.

### 6.14.3. Un-hiding Shifts

This option allows you to automatically unhide all hidden shifts when you send out your new shifts. It effectively means the schedule of shifts will be published at this point. If shifts are left as hidden then they will not be shown to staff in the email or via the site.

### 6.14.4. Example Email

The shift emails include all key details on a shift: date, times, venue, role/skill, task (if assigned) and shift event (if set).




## 6.15. Budgets

The budget feature within StaffSavvy allows you to display budget target information before a shift and report on your adherence to the budget afterwards.

Budgets are set and managed per venue and can be enabled/disabled for each one. There are two calculation methods for the budget:

- Basic Fixed Budget (you simply enter the budget for staff costs for that day)
- Sales Take Percentage (you set your staff budget as a percentage of your sales. Each day you enter your sales target and actual sales)

### 6.15.1. Budget Deviation

When setting up the budget confirmation on the venue, you will be asked to provide an acceptable deviation percentage. This is the amount that you are happy for the staff costs to be above or below your target and label it a success.

Staff costs that are heavily below the target staff costs normally indicate that there were problems with service during a shift. This is because understaffing is treated the same as over staffing.

### 6.15.2. Setting Targets

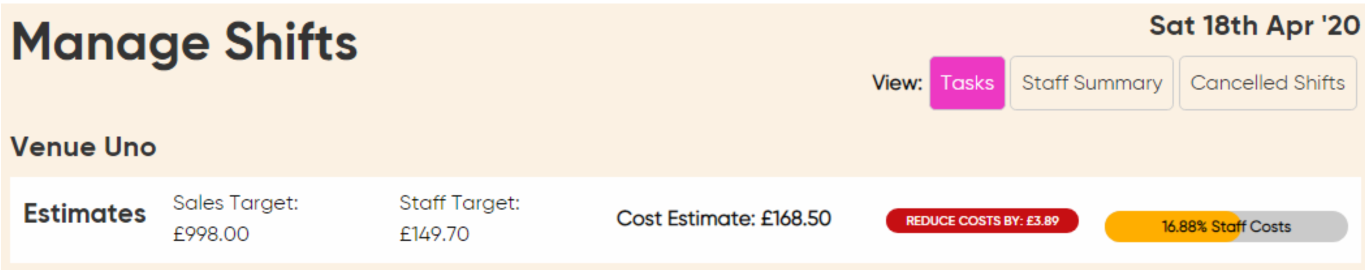
Once budgets are enabled on your venue, you will find two additional columns on Manage Shifts. This first column will be where you enter the target information for that day. For fixed budget venues, this will purely be the staff budget you need to hit. For percentage take budgets, it will ask for your sales target.

As soon as the target information is entered, you will see the budget indicator bar appear to the right. This will be highlighted orange if the current estimate for the shift is outside of the acceptable budget deviation. It will give you a percentage compared to your target too.

### 6.15.3. Target Details

On the Manage Shifts page for a particular day or Manage Shift Timeline page, you will now see a breakdown of the budget target and your adherence to that.

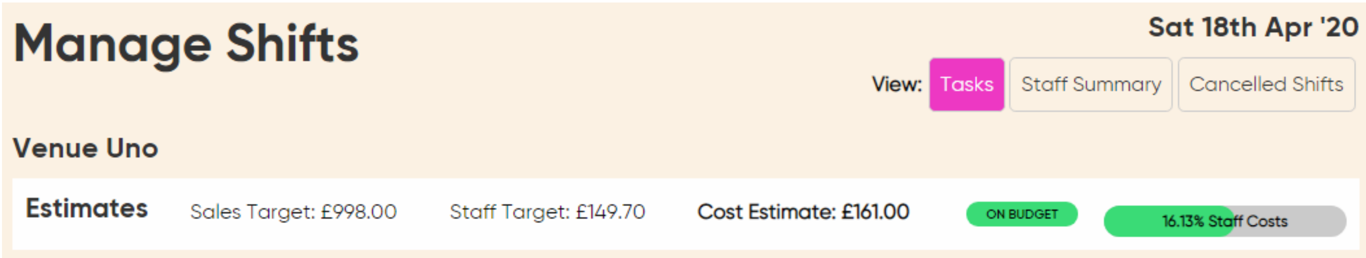
When over/under budget:




You can clearly see the sales target followed by the actual staff target (based on the staff cost percentage). This is followed by your total estimated staff costs for this shift.

The red box shows the exact value to reduce the shift cost by being in budget (that is, to be within the budget deviation percentage) and the orange bar shows your overall percentage to budget. You can also choose to see this as a simple staff cost percentage instead.

When on budget:




The right hand side will update to confirm the shift is on budget and the shine green.

When using the shift timeline page, the costs will dynamically update as you drag the shift times up and down.

## 6.16. Staffing Ratios

Staffing Ratios are automatic warnings when staffing levels drop below a required ratio for the activity listed. For example, the ratios can alert you if you have too few first aiders on duty for a particular size of crowd.

They can be used for any number of types of shifts and you can have any number of ratios displayed at the same time.

Ratios are configured on a venue. Go to System > Venues > Manage Venues. Use the More button to manage Ratios.

### 6.16.1. Creating a Ratio

You’ll need to set a title for your ratio that you will understand.
You can then set times for the ratio to be in effect. This ensures you are not alerted to a lack of staff when you are closed. You can also set rules to ignore the ratios on specific nation and organisation holidays.

You’ll need to configure the “unit” that tells the system how many staff you need. This can be “customers”, “children under 2”, “calls per hour” - anything you need.

Provide the ratio you wish to always maintain; e.g. 100 customers per staff member. You can also set a warning level so that if it drops below that level then you’ll see a warning message. Finally, you can also set a minimum staffing level; this will be the lowest number of staff you can have with the roles regardless of the ratio.

The default number of units allows you to set the normal expected level rather than having to manually add this every day. You can then just edit this as needed.

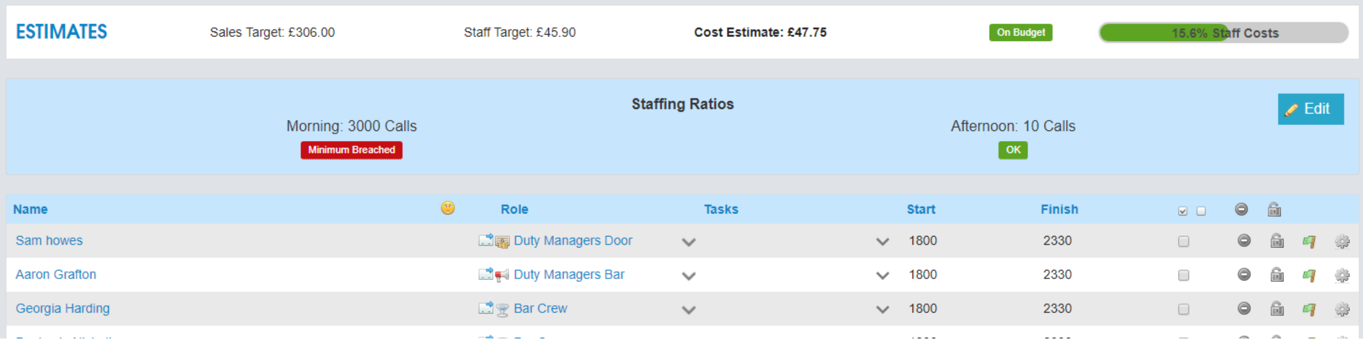
The final section is the roles/skills to be included. This stipulates which roles should be part of meeting this ratio. You can include only staff working in those roles within the venue or just if you have staff on duty who also have those roles.

You can have as many different ratios, separate or overlapping on a single venue. These will all be displayed.

### 6.16.2. Viewing the ratios

Once configured, the ratios will appear immediately:




Edit button on the right will allow you to set the expected units for this day and therefore adjust your ratios.

Ratios will be displayed as Green OK (working ratios met), Orange (warning that the ratios are close to being breached) and Red (ratio rule has been breached).

The ratios will be displayed on the grid and week views.

## 6.17. Shift Ranges

Shift Ranges allow bulk changes to the visibility of shifts along with setting rules for Covershift Credits. These credits are designed to help reduce the number of staff looking to swap shifts and increase the number looking to cover others or pick up additional shifts.

Within Shift Settings you are able to set shift ranges. The first view will show all of the shift ranges that have so far been created. This overview also allows you to make bulk visibility changes to any shift within that range.

To create a new shift range click “Actions” in the right corner of the menu and “Create New Range”.

Here you can set the range with the following information:

**General**

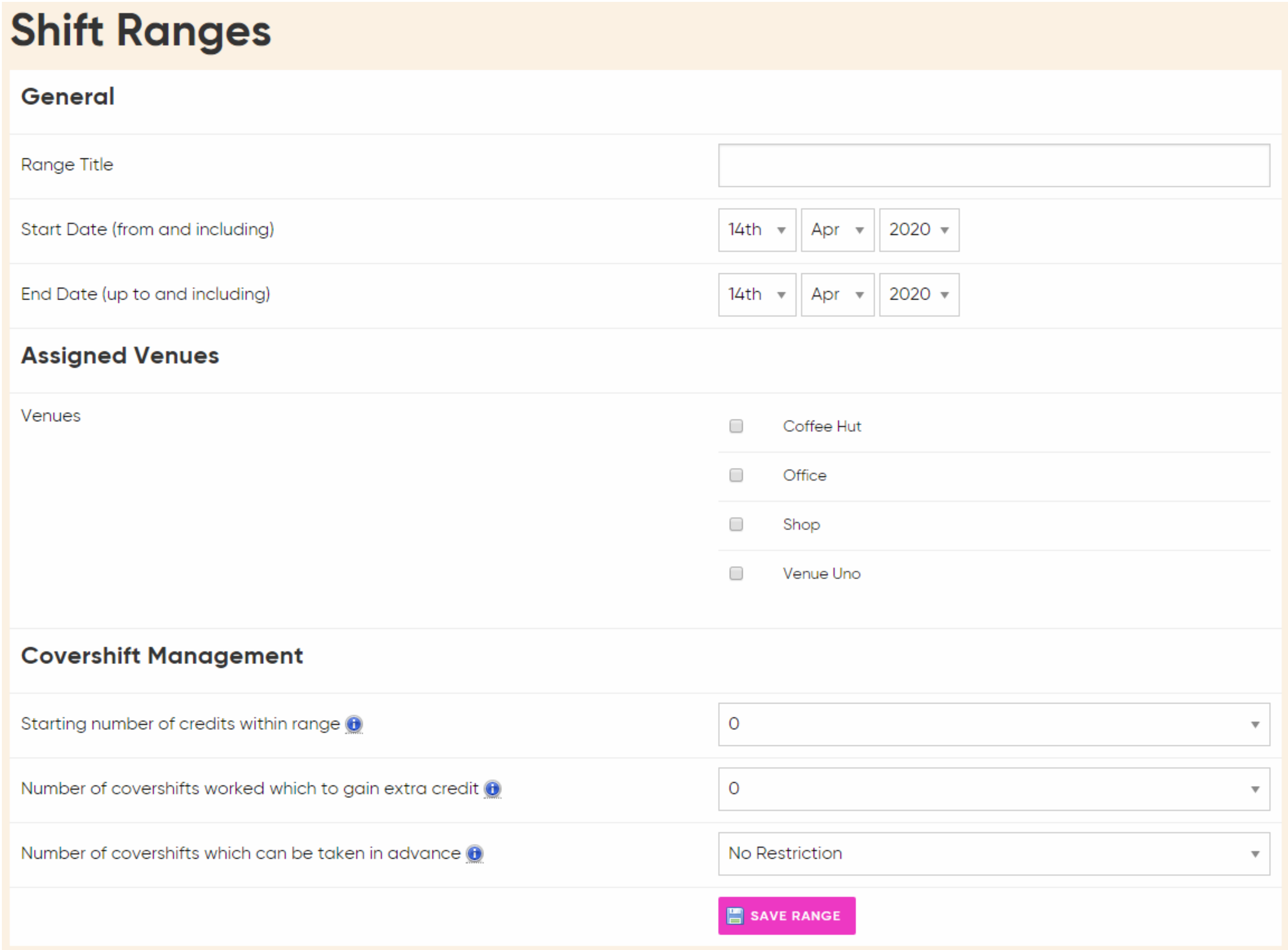
- **Range Title**
  A title that is easily recognisable and understandable.
- **Assigned Venues**
  Which of our venues will use this shift range.
  Note that venues can only be assigned to a single range at any given time. If a venue is already assigned to another range or the range overlaps another then it will be blocked.
- **Start/End Date (from/up to and including)**
  The beginning and end dates of the shifts that you would like to include within the range.

**Covershift Management**

- **Starting number of credits within range:**
  Set the number of shifts that staff members can request cover for without having to cover another staff member's shift. This essentially allows a credit system to be put in place so that staff members cannot continuously request cover for their own shifts without covering other staff members.
- **Number of covershifts worked which to gain extra credit**
  In this credit system, staff members can earn 'cover credits' by working a number of cover shifts. You can determine how many covershifts someone needs to work in order to earn another credit here.
- **Number of covershifts which can be taken in advance**
  You can determine how many covershifts can be asked for in advance of a shift being worked, i.e. if the restriction is set to 2, John can request two covershifts but must work at least one shift before he can request more.

Please note that the covershift management credit system is completely optional.


Shift Ranges

General

| | |
|---|---|
| Range Title | |
| Start Date (from and including) | 14th / Apr / 2020 |
| End Date (up to and including) | 14th / Apr / 2020 |

Assigned Venues

| | |
|---|---|
| Venues | Coffee Hut |
| | Office |
| | Shop |
| | Venue Uno |

Covershift Management

| | |
|---|---|
| Starting number of credits within range | 0 |
| Number of covershifts worked which to gain extra credit | 0 |
| Number of covershifts which can be taken in advance | No Restriction |

SAVE RANGE

# 7. Clocking In

## 7.1. Clocking In Screens

StaffSavvy primarily uses "clock in screens" to record the actual hours worked. Clock-in screens are simply any browser that has been authorised by an approved manager to use as a clock in location for staff members to be signed in. They can be laptops, EPOS tills, desktops; any internet browser. We recommend using Android tablets secured to the wall where staff start work or duty managers are positioned regularly.

We recommend the Android and iOS software SureFox Pro to secure the tablets and prevent anyone using them for other purposes. This also keeps the tablets switched on permanently and removes toolbars from the top and bottom of the screen. We have a guide on the best setup to use for Surefox Pro; contact support@staffsavvy.com for details.

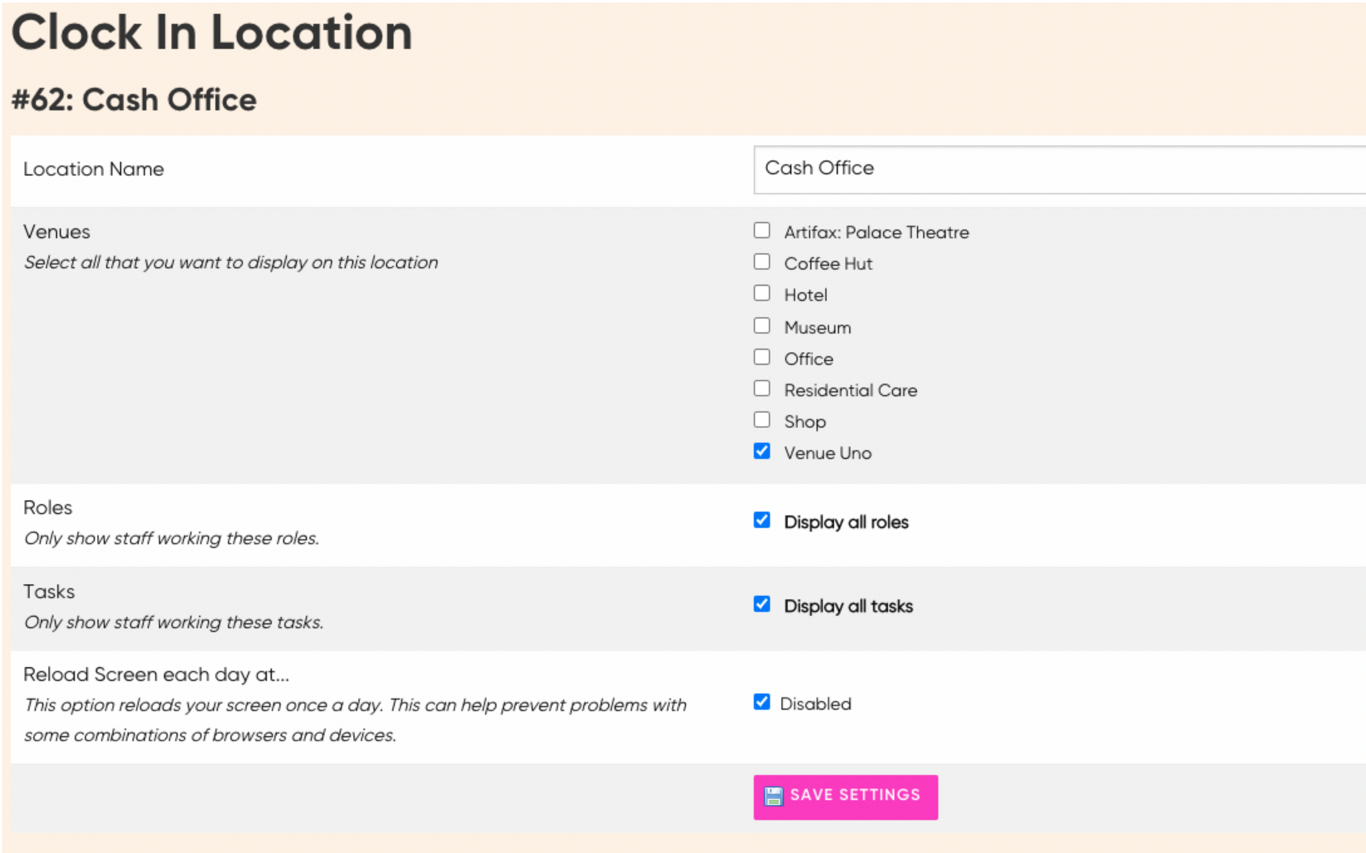
### 7.1.1. Authorising A Clock In Screen

To setup a clock in screen, simply direct the browser of your clock in screen device to your URL followed by /clockin
E.g.: mysite.staffsavvy.me/clockin

The screen will load a form that needs to be completed to authorise the location. As part of this, there is a title for your reference and a selection option to choose which venues within your organisation should be displayed on this screen. You will need to enter your email address and password to authorise the screen. Only certain users are allowed to authorise screens.

You can have as many clock in screens authorised as you need and they can each show different combinations of venues.




### 7.1.2. Editing a clock in screen

You can edit the settings for a single clock in screen via the Pay > Manage Clock In Screen page.

| Location Reference | Screen Name | Last Active | |
|---|---|---|---|
| 62 | Cash Office | 30/11/-0001 00:00am | EDIT DEAUTHORISE LOCATION |
| 60 | Demo | 30/11/-0001 00:00am | EDIT DEAUTHORISE LOCATION |
| 63 | Sam | 30/11/-0001 00:00am | EDIT DEAUTHORISE LOCATION |
| 61 | Sams | 30/11/-0001 00:00am | EDIT DEAUTHORISE LOCATION |
| 50 | TOFS 1 | 24/05/2022 09:06am | EDIT DEAUTHORISE LOCATION |

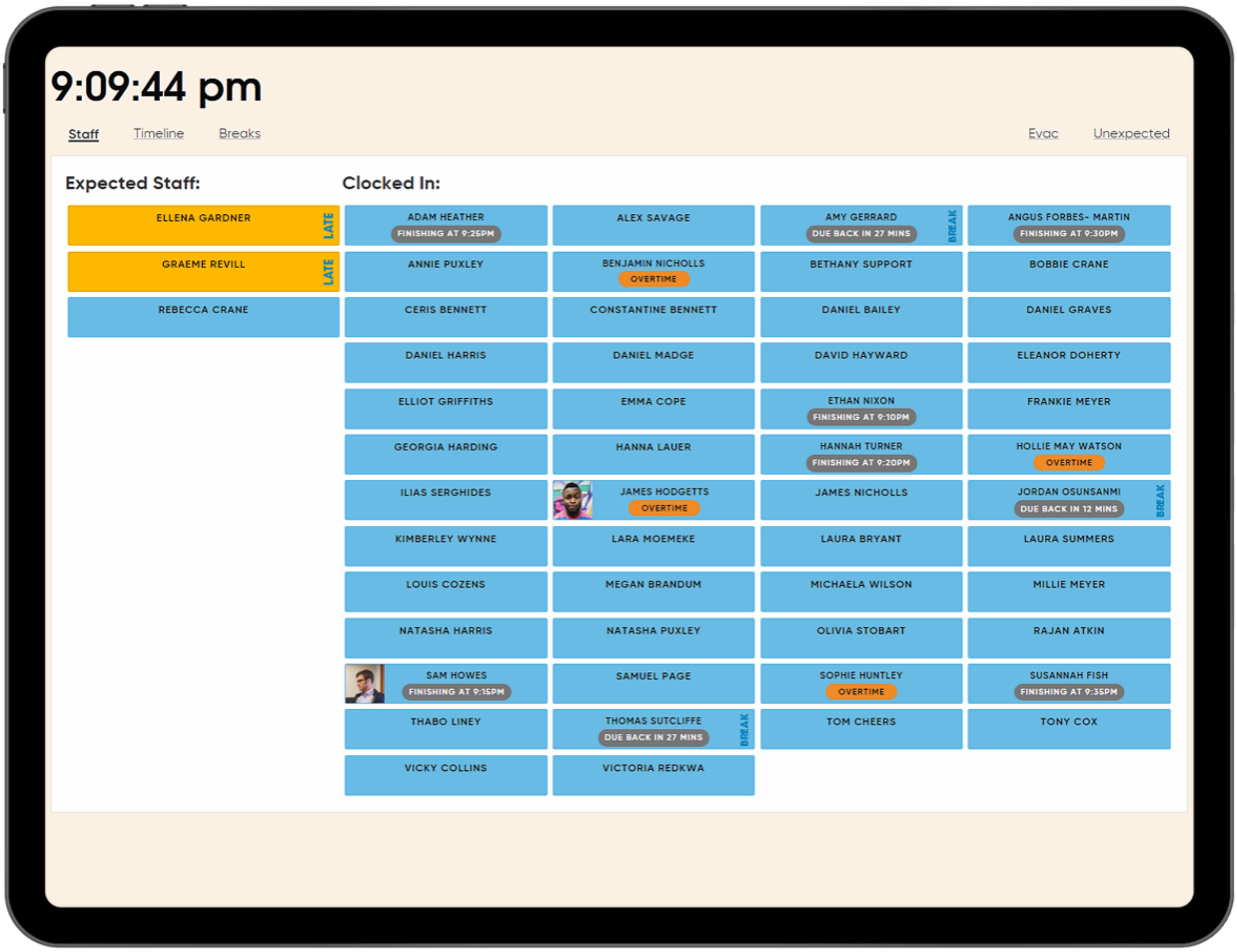
Here you can see the active screens and click the edit button to change. You can also deauthorise a screen remotely which will instantly stop the screen from working.

Editing the screen provides access to change the name, the venues/outlets displayed on it and to turn on role or task filters. The filters enable you to only display shifts that are for these roles or tasks within the clock in screen.

For example, you might have one screen on the bar and one in the kitchen. The staff schedule is all in a single venue but the clock in screens can be split so show the kitchen roles on the kitchen screen and the bar roles on the bar screen.

## 7.2. Using the Clock in Screen




The clock in screens shows the time in the top left and a series of tabs below this across the page. These tabs show all staff members expected for the current shifts and indicate whether they have clocked in or are late.You can also show a live webcam feed in the top right to discourage staff clocking each other in.

### 7.2.1. Filter Settings

You can apply filters to each of the screens to choose certain roles or shift tasks to be displayed on that screen. To configure the Filters, you need to edit the screen from the main website. Go to Pay > Mange Clock in Screens > Edit > Clock In Locations.
Edit your clock in location.

If you don't know which location your screen is (due to duplicate names etc) then you can use the Screen Location Number. On the screen, click the Evacuation tab. At the bottom of the screen should be a Screen Info button. This button should provide a popup that includes the Location Reference Number. Find this number in the list on the main website to make sure you are updating the correct screen.

When editing from the 'Manage Clock in Screen' page, you will see the ability to rename the screen, change the assigned venues and then also to apply role and/or shift task filters. Once saved, the screen should refresh itself within 60 seconds and show the new filtered staff lists and shifts.

### 7.2.2. Placement of Screens

We recommend that clock in screens are positioned where duty managers or supervisors have regular access. While the screen will do everything possible to accurately record who is present or not, there is no substitute for effective people management.

Having easy access to the screen allows the management team to keep track of staff lateness, prompt clocking out and breaks. This might require you to invest in more screens at the start however the benefits will be shown in reduced admin time and better control over staff costs.

### 7.2.3. Web Cam / Clock In Photos

The screens can use any attached or embedded webcams to capture an image of the staff member clocking in/out. The feed from the camera can also be displayed on the screen as both notification of the camera's operation plus a deterrent from clocking in colleagues without them being present.

This option is enabled under System >Configuration > Global Settings > Configuration > Time Entries /Clock Ins.

Once enabled, the screens will refresh. Depending on the settings of your browser, you might need to allow webcam access by the site. This should be shown as a popup or warning icon within the browser.

### 7.2.4. Timeline

The timeline view shows all staff expected at this location over the next few hours. The shifts are colour coded to match the skills of the shift.

This provides the management team with an easy access view as to when more staff are due and when other staff should be leaving.

### 7.2.5. Breaks

The clock in screen is designed to show breaks for employees who are currently working at your location. The breaks available to them are based on the length of shift they are scheduled to do. Breaks settings can be configured under Global Settings > Configuration. This setting allows you to control how breaks are taken.Staff should clock out for a break using the break option so the system understands they are on a break and will be due back.
To go on a break, a staff member either touches their name on the main screen and chooses the applicable break or you can use the Start Break button on the Break List tab.

The screen will automatically calculate the time for the staff member to come back.

Unpaid breaks will be deducted until the staff member returns.
Paid breaks will be recorded until the end of the paid break. If the staff member has not returned, the system will stop the paid break and start an unpaid break automatically. This will end once the staff member clocks back in from their break.

The break list will update to show staff who have breaks remaining. Staff who do not use their full break will also be listed along with how much time they have left to take.

### 7.2.6. Evacuation

The evacuation tab provides access to our Evacuation button. When pressed, the supervisors on duty will be sent SMS messages with the list of currently working staff.

You can configure your supervisors for the purposes of the evacuation notification under System > Configuration Evacuation Alerts

### 7.2.7. Unexpected Shift

This screen allows staff to clock in with a PIN code (if they have one). This therefore allows staff to clock in without a planned shift. This should only be used by staff who need the ability to clock in anytime.

If all staff have a PIN code then they can also clock in early for shifts and entitle themselves to unlimited breaks (as the system doesn't know how long they are due to be working).
The time entry approval process is also longer as there is no plan to check the time entry against.

### 7.2.8. Transfer Staff Member

Sometimes it is necessary to transfer staff members either between roles (e.g. bar staff to supervisor role) or between venues. This can be done at the point of change via the clock in screens so that you accurately record when staff change pay rates or cost centres.

To transfer a staff member, you need to first set up which venues can share staff. This can be navigated by System > Venues > Manage Venues > Clock in. Under the Clock In Settings for each Venue, you will see a section for Transferring Staff. Ensure the venues you want to be able to send staff to from this venue are selected.

Managers who need to transfer staff will also need a PIN code to authorise the change on the clock in screens. You can assign PIN codes under their Profile Page using the Actions menu under the Edit Details tab.

To transfer a staff member on the screen, just click on their name from the main staff list.Under the Break options there is a Transfer Staff Member button. You will be asked for your PIN code to authorise the transfer. Then choose the venue the staff member is moving to (including the current venue if you are just changing roles). Then choose the destination role.

The staff member will then be transferred to the new venue. This will create a linked time entry so that the hours can be correctly reported.

If the time entry is edited, it will automatically update any other linked time entry. E.g. if you change the end time then the start time of the following time entry will be updated to match. This prevents any staff member from being paid twice for the same period of time accidentally.

### 7.2.9. Contract Limits Warning

Staff who are assigned to a hard limit contract (e.g. hour-limited visas) will have warnings displayed under their name as they approach the limits under their contracts. This is designed to help managers send these employees home before they hit their working limit. The information is also shown to the staff member as it is also their legal responsibility not to work over their limit.

### 7.2.10. Screen Information

Under the evacuation tab is a Screen Info button right at the bottom of the page.

This provides access to the name of the screen, its screen location number, the venues displayed along with any role or shift task filters.

The popup will also show a history of internet connectivity so you can see if there has been any issues within this current session. This log is reset when the screen is restarted or refreshed remotely.

### 7.2.11. Deactivate/Deauthorize Screen

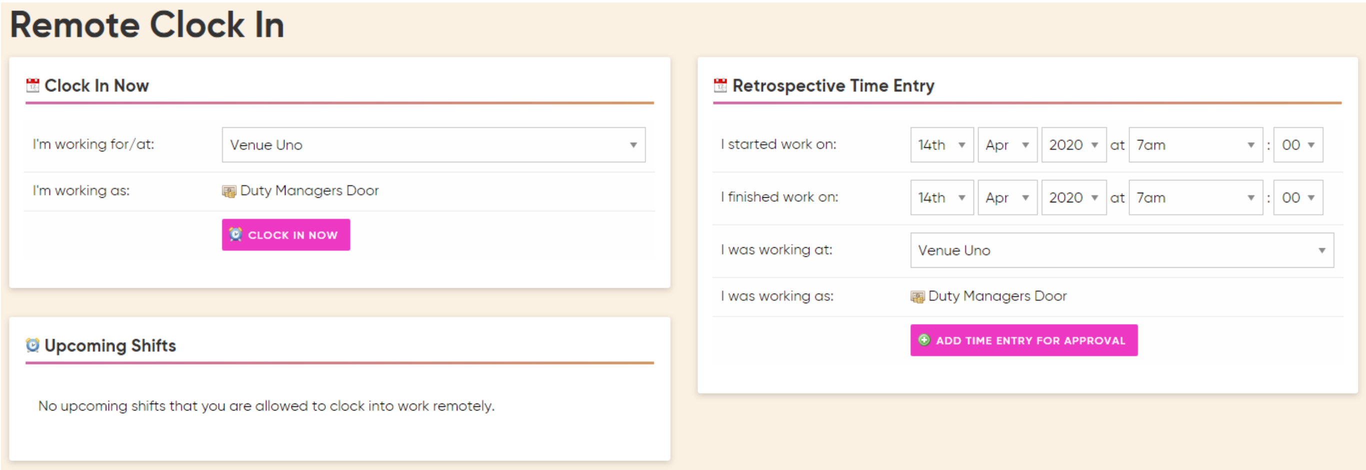
Under the evacuation tab is a Deauthorize Screen button right at the bottom of the page.

This will remove the clock in screen so that this device cannot be used for clocking in again. This can also be done remotely from the Pay > Manage Clock In Screens page.

## 7.3. Clock In Remotely or Retrospectively

Under each skill/role you can now allow staff within that role to clock in remotely via their StaffSavvy account. Depending on the options you allow, this will enable them to clock in for planned shifts, clock in anytime or add a past time entry for approval.

Only staff who are assigned to a role that allows them to clock in remotely will see the page in the menu and they will only be able to do the allowed clocking in/out per role. For example, they might be able to clock in anytime for any job they do in their own time but only clock in for planned shifts if they are off-site doing promotional work or training.



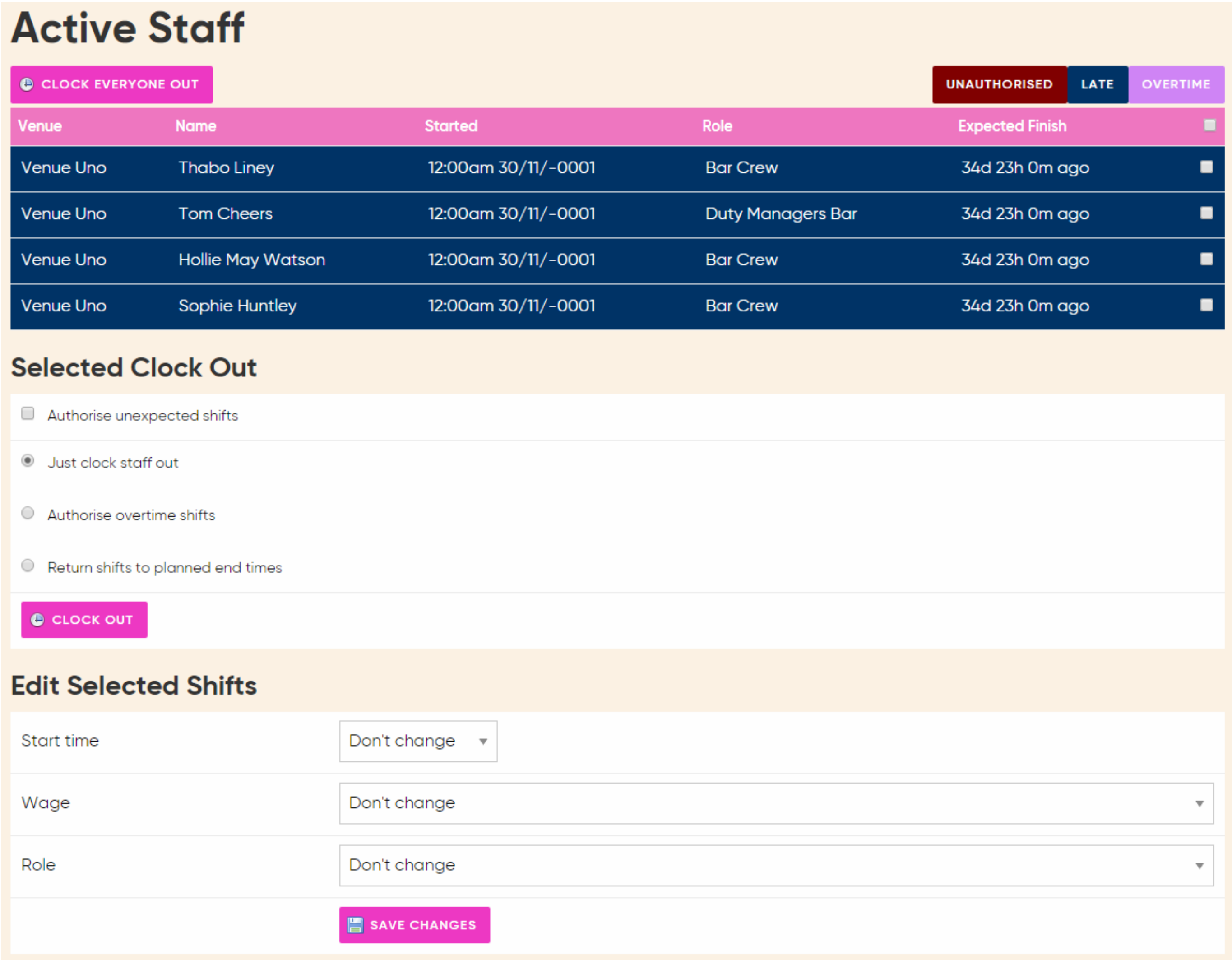
# 8. Timesheets & Payroll

The following can be managed by going to Dashboard > Pay.

## 8.1. Active Staff

Here you can review the active staff on shift. T. It will show who has clocked in for their shift, if they were late, if they're working overtime, and if the shift was unauthorised. You can also alter the staff member's start time, pay element, and role if necessary.

You can also clock out a staff member from their shift.

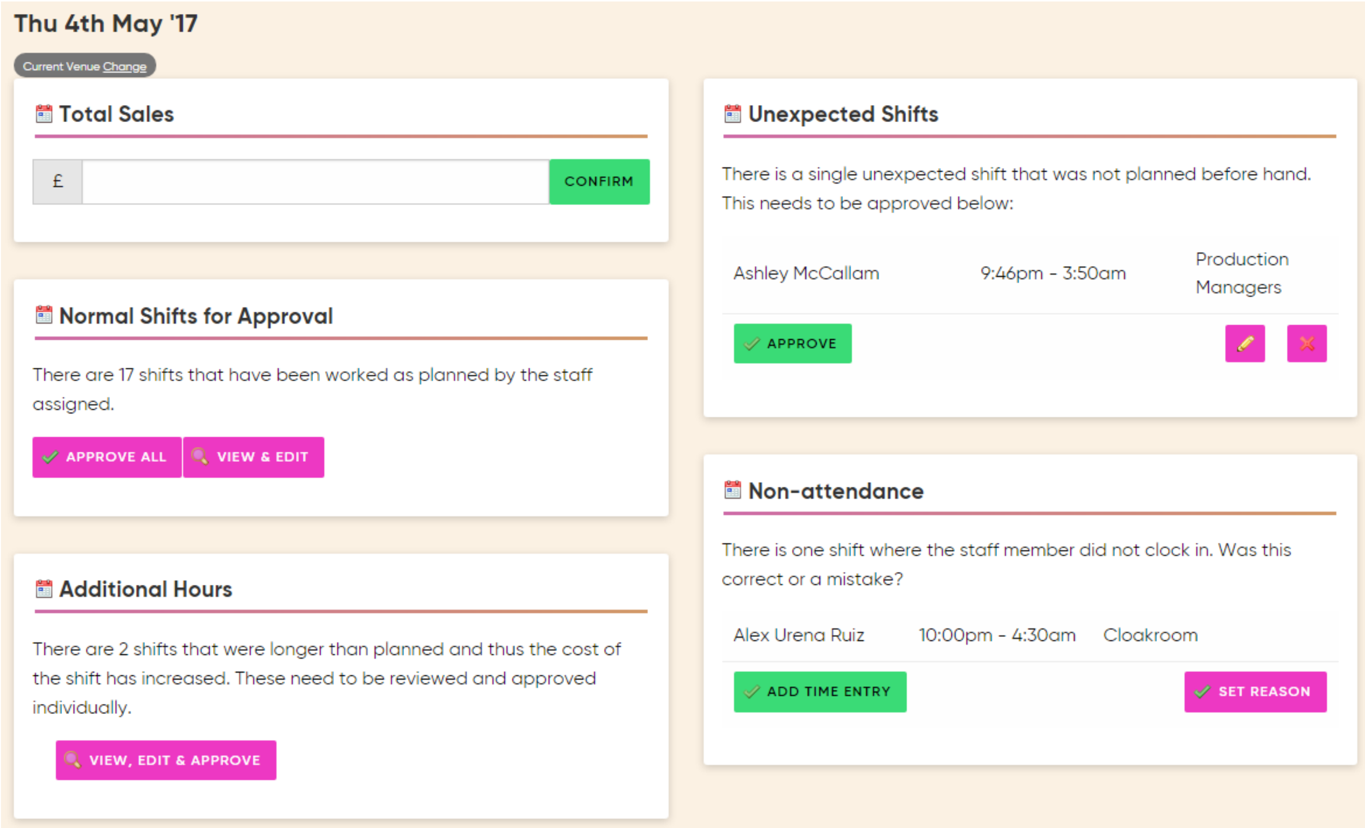


## 8.2. Daily Review

The daily review is designed to help managers approve the hours worked while it's still fresh. It's designed to work on your mobile device and can be accessed throughout the day to approve hours worked as the shifts are completed. It can also be used just at the end of the day or in the following days.

The review page will display all shifts that have not been approved regardless of when they happened. The page will split these into days so you can approve each day as needed.

Within a day, the page will split the shifts into different blocks depending on how much review is suggested.



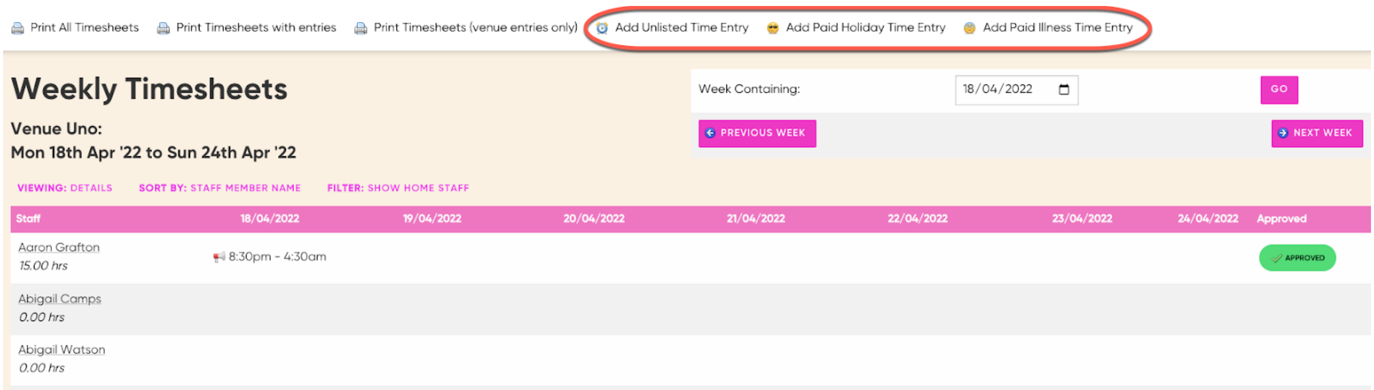

- **Normal Time Entries**
  These time entries were all worked to the shift plan or less so there is no negative impact on your budget. You can approve this all in one go or click on view and edit to check each one.
- **Additional Hours**
  These time entries are longer than the planned shift and you can either approve them or edit them down to the correct length.
- **Unexpected Time Entries**
  These are time entries that did not appear on the plan. They can be time entries that were clocked in via PIN or remotely if these options are used.

- **Active Staff**
  Any staff members still clocked in will be displayed with an option to clock out now or to clock out and reset their times to the shift plan.
- **Confirm Non-attendance**
  Any staff who do not clock in for a planned shift will also be displayed with the option to add a time entry for them or to provide a non-attendance reason.
- **Confirm Lateness**
  Any staff who has been automatically flagged as late will be shown here. You can simply confirm or reject each of the lateness flags. Rejecting a flag will mark them as attended on time but will not change their clock in time.

## 8.3. Weekly Timesheet

If you wish to review shifts on a weekly basis instead then the Weekly Timesheet view is perfect. This shows you the full staff list and details who has worked in the past week (from today's date). It shows who has worked, the type of shift that they have worked, and their hours.




The actions menu at the top allows you to add missing entries, add paid holiday or paid illness, as well as being able to print all timesheets or only those with shifts.

Managers can approve shifts by simply clicking the Approve button. This will approve the full week's worth of shifts for that staff member. Approved shifts are shown with the green approved label on the right.

Clicking on a clock in/out time will allow the time entry to be edited.
By default, the list will be ordered by the staff members' name. You can change this to a hierarchy which uses the Role order based on the staff member's default role. This allows you to show managers at the top for example.

**Note:** If a time entry is displayed in italics, it indicates these are times the staff member worked at a different venue. You can edit these times by going to the venue and viewing the time entries.

### 8.3.1. Quick Edit

The quick edit view allows you to simply type in the changes to time entries or add new entries by adding the times. See the quick view on manage shift week to see how this works.

It's important to know that only staff with a default role can have shifts added/edited like this (as the system needs to know where they should have worked). Once a time entry has been added, you can swap back to the normal view to edit the time entry details if required.

## 8.4. Pay Elements

You can set the pay elements for various staff types under Dashboard > Pay > Pay Settings. Here you can select "Create Pay Element'' from the "Actions" menu. This allows you to set up the pay elements and details.

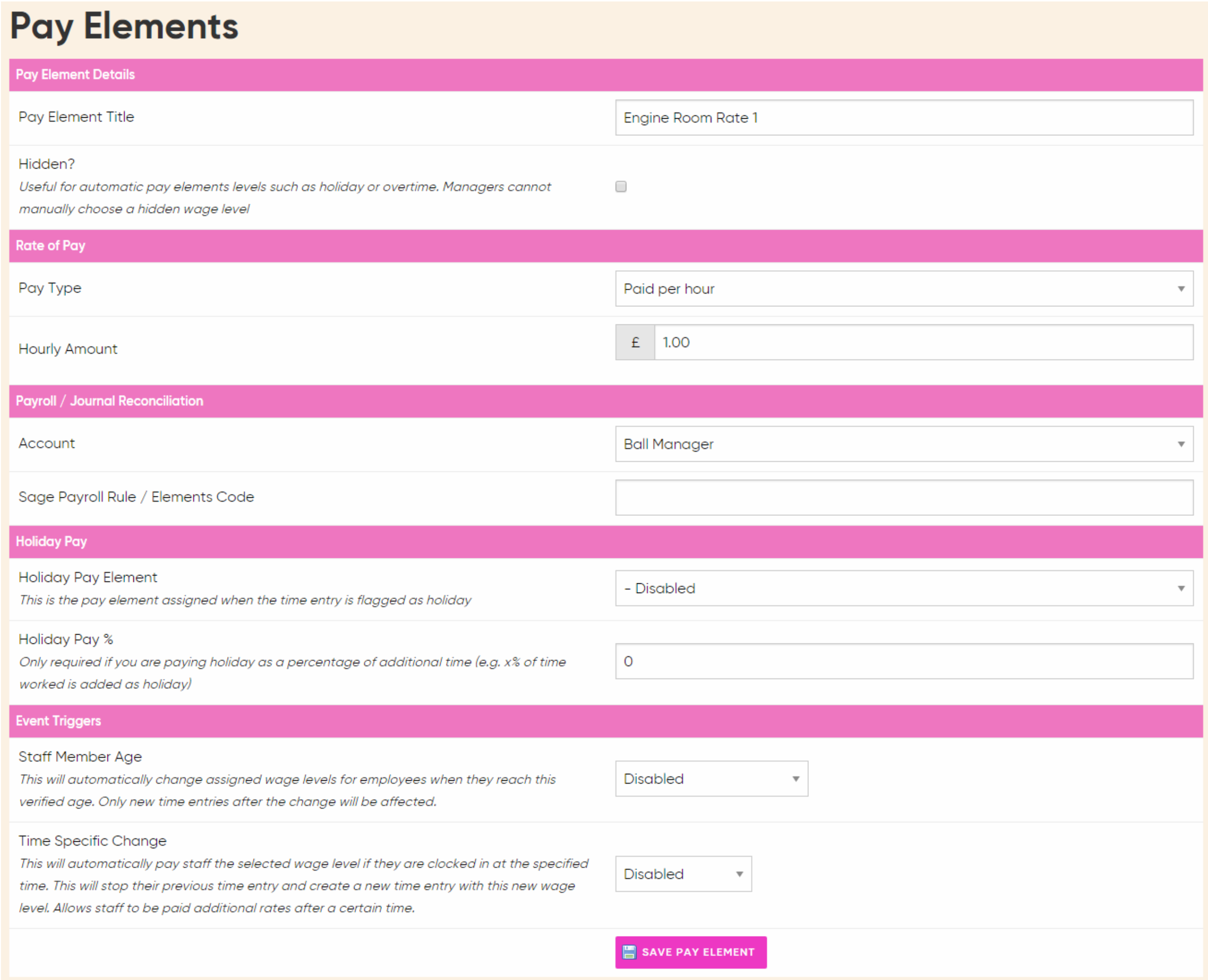
**Pay Element Details**

- **Pay Element Title**
  Give the pay element a recognisable title.

- **Hidden?**
  Checking the box will hide these pay element details from most screens. It's perfect for hiding holiday rates of pay.
- **Pay Type**
  This is either Hourly Rate (e.g. staff are paid by the minute) or pay item (staff are paid the rate for each item they have sold/completed).
- **Hourly Amount**
  Determine the hourly amount for this pay element.
- **Account**
  Optional: Select the appropriate Account (see Pay Element Accounts for more information).

**Holiday Pay**

- **Holiday Pay Element:**
  Select whether Holiday Pay Elementis disabled, or which pay element is appropriate for the pay element from the existing pay element list.
- **Holiday Pay %:**
  If you have selected a Holiday Pay Element, you can choose the percentage of that pay element that will be given to the staff member when they take holiday. This is entered as a percentage.
- **Event Triggers**
  Here you can enable automatic changes to payroll provided they meet a certain age or time spent working for the company.



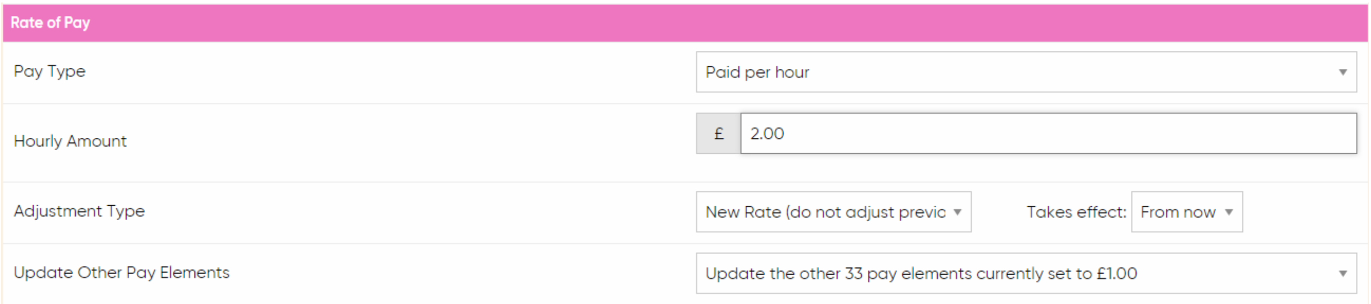

You can edit or delete existing Pay Elements from the main list.

### 8.4.1. Scheduled Rate Changes

When editing an hourly rate, the system will ask if the rate is a correction or a scheduled change. A correction will change the current hourly rate and change any unprocessed hourly rates to match the new rate.
The New Rate option will create a new hourly rate and you can choose to apply it instantly or at a set date or time.

The system will also record all changes made to the hourly rates and will correctly select the right hourly rate historically for any time entry added for in the past or the future.

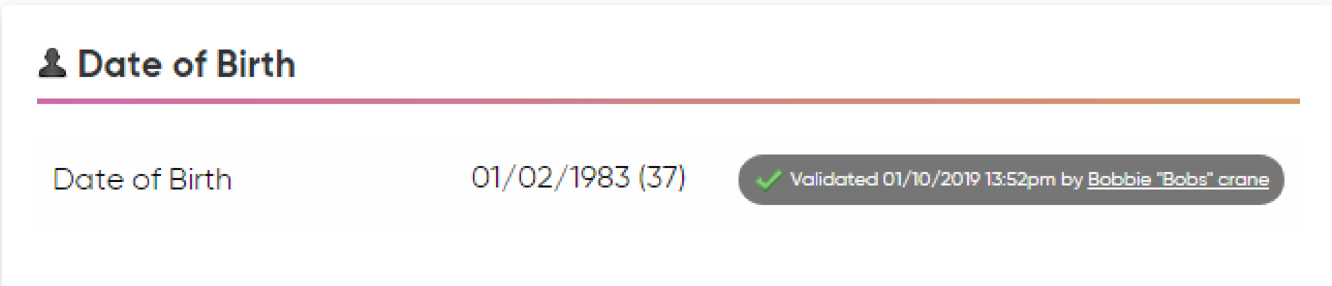



## 8.4.2. Age-Based Rate Changes

This allows you to automatically change a staff member's hourly rate once they turn specific ages.

The first step is to ensure we have a verified date of birth for each staff member. This can be done in two places; either when a document is uploaded that contains a DOB (passports for example) or on the staff member's account when editing their details.

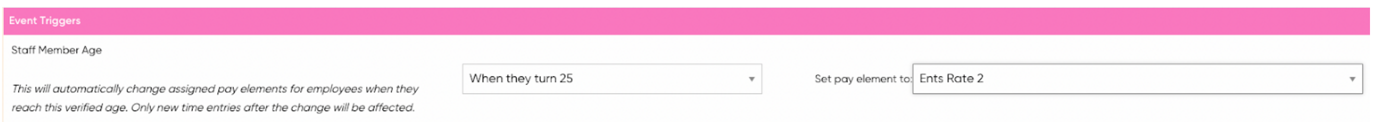
Once verified by a manager, a DOB will be shown as this example:




A verified DOB is required for the age trigger to work on a staff account. If the DOB is provided but not verified then the staff member's rates will not be changed. This is to prevent staff from setting (and changing) their own DOBs and therefore changing their rates.

To set up a change based on age, simply edit the pay element rates and set an age trigger. Choose the next pay element that the site should change the staff member's pay to.

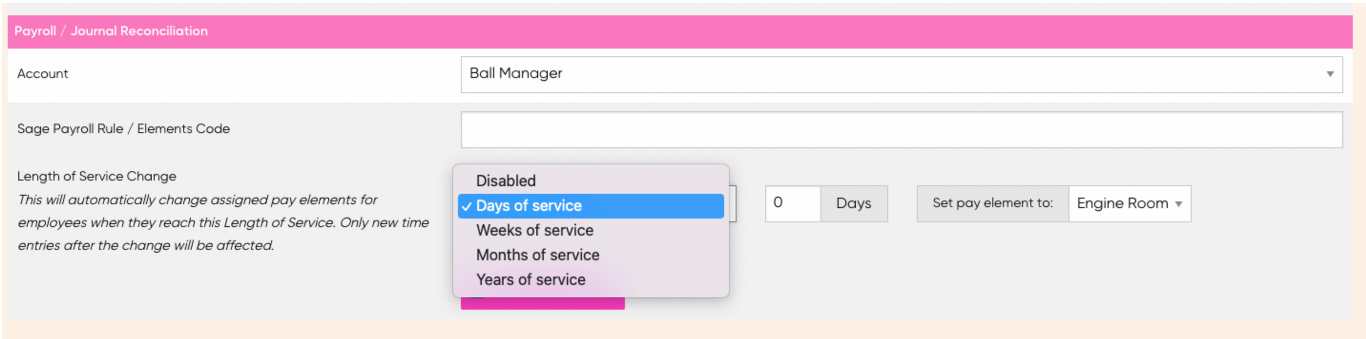
On the day the staff member changes to be the set age, the site will automatically select all roles for which they are paid the normal rate and will set a bespoke rate to the selected pay element.



## 8.5. Length of Service

Pay Elements can now have Length of Service adjustments within them allowing the system to automatically change staff between pay elements depending on their length of service.

This can be changed via Pay > Pay Settings. In the actions menu go to, 'Create a New Pay Element'. Under rate of pay, Pay Type should be set to 'Paid Per Item'. This allows for Length of Service Adjustments.




This is where you set what will trigger an automatic change to pay when a length of service has been met. This can be set to days, weeks, months or years.

### 8.5.1. Time Specific Changes

This allows you to change the hourly rate of any staff working past a fixed time. For example, paying staff more once they work past 3am.

To set this up, simply choose the time of day and choose the rate of pay that the time entry should be changed to.

When a staff member is clocked in at this specific time of day, the system will stop the current time entry with the existing hourly rate and create a new time entry with the new hourly rate.

When managing the time entries afterwards, you will see two time entries for any staff clocked in at the set time. This is expected, the time entries represent the two different rates of pay for a single shift.

If you edit the midpoint of the shift, e.g. the time the rates change then both time entries will be updated to ensure the staff member is paid in a continuous run from the moment they clock in to the moment they clock out.
The breaks system understands that the two different time entries are connected and will correctly calculate breaks already worked and those owed.

### 8.5.2. Using Hourly Pay Rates

Hourly pay rates are associated with time entries; a period of time that a staff member was working for you. During this time they are paid the associated hourly rate.

By default, the hourly rate used is the one set on the role/skill that the staff member is working at. You can also override this on each staff member's account (See Staff Roles).

To add time entries, you can use the clock in screens or manually add the entries via pages such as the Weekly Timesheet and Unprocessed Pay.

### 8.5.3. Using Pay Items

Pay Items allow you to pay staff for a unit rather than an hour of work. You can specify each of your pay items and how much each item is worth in currency.

You can then assign the pay items to each of the roles/skills that can be rewarded via that pay item to quickly pay staff their commission or bonuses.

Once created, you can either manually add the pay items via Unprocessed Pay or by assigning the pay item rates to roles and using the quick Add Pay Items page.

For the Unprocessed Pay method, click Actions > Add Unlisted Pay Item. Choose who to assign the item to and the total number of items to add.

For the Add Pay Items method, you need to assign the pay items to roles so the system knows which ones apply to different staff in your business. To go Staff > Staff Settings > Manage Roles. Click Edit next to the role you want to change.

Under the Pay tab, you will see the default hourly rate plus the option to add Pay Per Item Rates. Select all of the pay item rates you wish to offer to those staff.

Once saved, you can now add pay items to the role. Go to Pay > Add Pay Items.
You will be asked to select a role to use.

You'll then see a grid with all of your staff listed on the left and all of the pay items across the top. Simply use the boxes to enter how many pay items you want each staff member to receive.

The system will calculate the total value for you and inform you of any previously assigned pay items that have not yet been paid. This will help to prevent duplication.

Once added, pay items will be included in wage sheets as per hourly rates and exported to your payroll system as simple units per rate.

# 8.6. Unprocessed Pay

This presents you with the full list of unprocessed pay - the total hours and cost, as well as unauthorised hours and cost, is listed in the Summary at the top of the page.  It is designed to show you a longer period of shifts and the total that will be paid out.

This list will also include pay items (often used for commission or bonus payments).

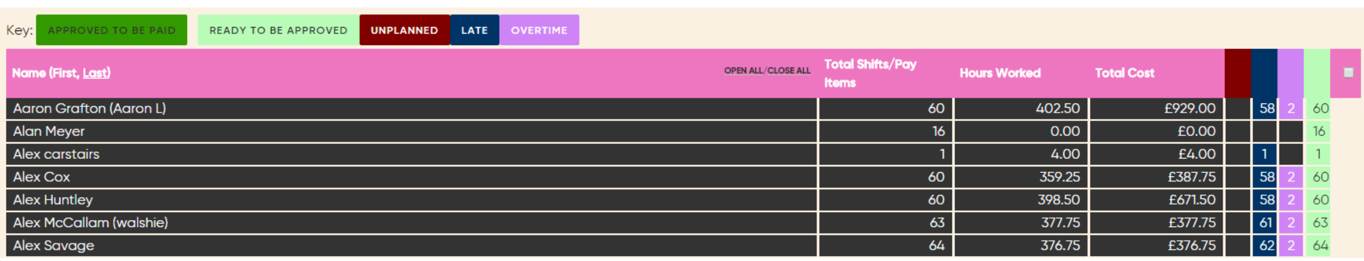
It can also be used to create small wage sheets containing just a few time entries or the time entries for a certain venue or all venues for a short period. This is useful if you have agreed to pay certain shifts quickly or out of sync for all other shifts.

This page allows you to make adjustments on what has - or has not - been worked to ensure that the items correctly reflect the staff member's shifts, hours, as well as your policy on overtime.

The Actions button in the corner of the menu allows you to:

- **Add unlisted time entry**
  You can add an unlisted time entry to the list to be processed (see 2.1 Adding Extra Shifts for more details).
- **Add Paid Holiday Time Entry**
  You can add a paid holiday time entry to the list to be processed. This is then counted as hours of holiday used and paid to the employee at the selected pay element.
- **Reset clock in/out times**
  You can reset a clock in or out time if you have made changes that you want to revert. Select the shift that you want to reset the times for and submit.
- **Finalise selected time entries**
  You can select specific time entries to finalise and move to the wage sheet.
- **Finalise all time entries**
  You can select all time entries to finalise and move to the wage sheet.

There may be times that you need to make adjustments to some of the shift information. To do so, select the staff member or member's that you would like to adjust details for using the checkbox on the far right, then make the adjustments using the white box below. Finally, click change to confirm your changes.



Key: APPROVED TO BE PAID | READY TO BE APPROVED | UNPLANNED | LATE | OVERTIME

| Name (First, Last) OPEN ALL/CLOSE ALL | Total Shifts/Pay Items | Hours Worked | Total Cost | | | | | |
|---|---|---|---|---|---|---|---|---|
| Aaron Grafton (Aaron L) | 60 | 402.50 | £929.00 | | 58 | 2 | 60 | |
| Alan Meyer | 16 | 0.00 | £0.00 | | | | 16 | |
| Alex carstairs | 1 | 4.00 | £4.00 | | 1 | | 1 | |
| Alex Cox | 60 | 359.25 | £387.75 | | 58 | 2 | 60 | |
| Alex Huntley | 60 | 398.50 | £671.50 | | 58 | 2 | 60 | |
| Alex McCallam (walshie) | 63 | 377.75 | £377.75 | | 61 | 2 | 63 | |
| Alex Savage | 64 | 376.75 | £376.75 | | 62 | 2 | 64 | |

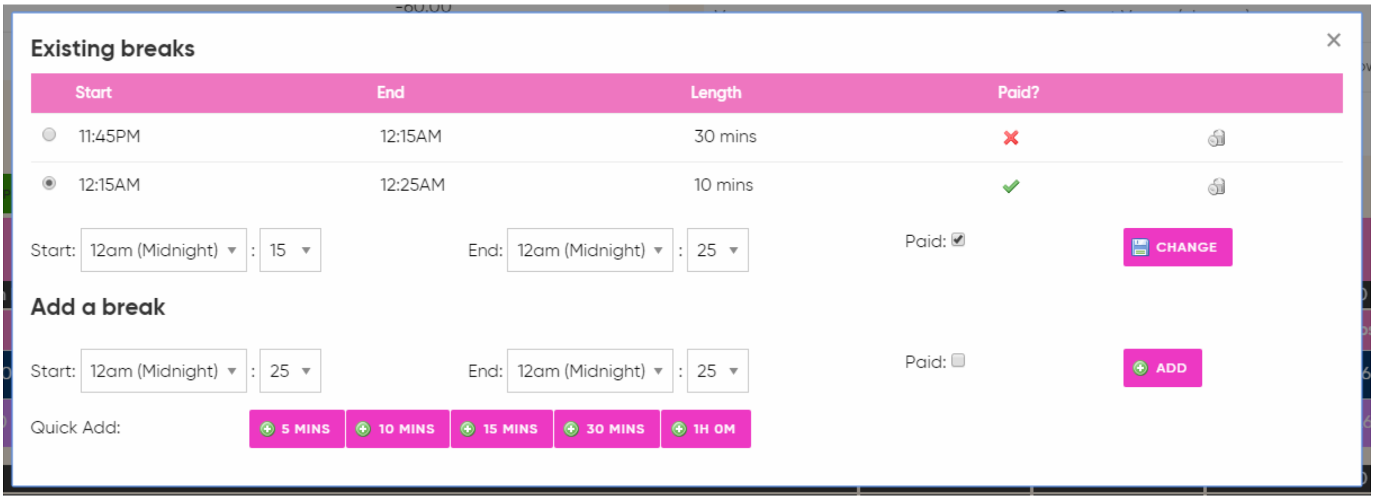
StaffSavvy

Clicking on the staff member's name shows you the breakdown of their shift(s). The pencil icon allows you to edit their clock in and clock out times, whilst the green check icon allows you to approve their overtime shift:


## 8.6.1. Breaks

The site can automatically calculate both paid and unpaid breaks for staff members of different shift lengths. Create and manage the break policies under System > HR settings > Shift Break Policies

Breaks can be manually added, edited and removed from the Unprocessed Pay page. Simply click on the time under the break's title on a particular shift and the following will be displayed:




This panel displays both existing breaks and the ability to add a break.

Paid breaks are kept for records only. Unpaid breaks will deduct the time from the total hours paid to the staff member. One of the options for StaffSavvy is that if any staff member comes back more than a few minutes late from a paid break, then the difference is added as unpaid. Meaning the staff member is deducted any additional time when they were on break but shouldn't have been.

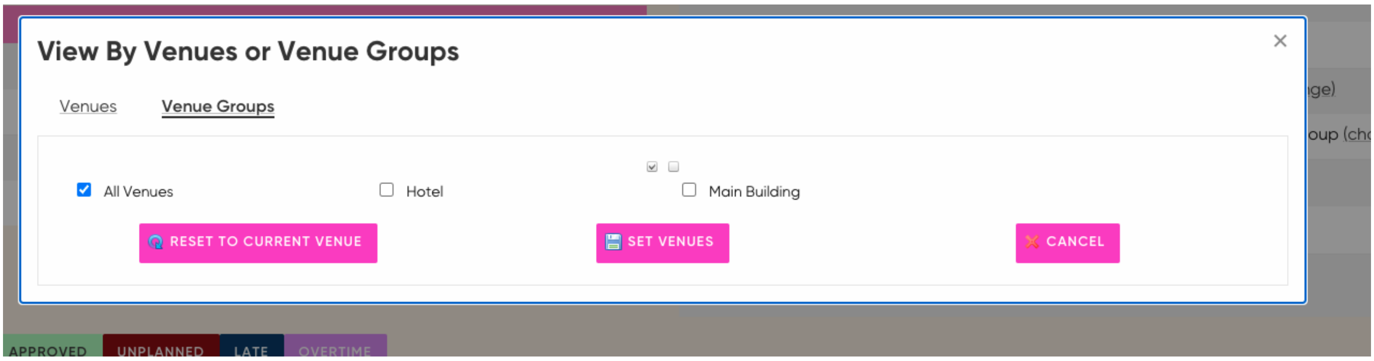
To edit a break time, just select it using the radio buttons on the left and set the times as needed underneath. Click 'Change' to adapt it. The bin icon will remove it completely.

## 8.7. Processing Selected Pay Items

You can process pay items at a single venue or all venues at once. This allows multiple expense times to be processed at the same time.

To view Unprocessed Pay Items go to Pay > Add Pay Items. Choose the role you are interested in and you will be able to view all current expenses from all venues. To do this click to change Venue under the Filter tab. Then go to Venue Groups and select All Venues.



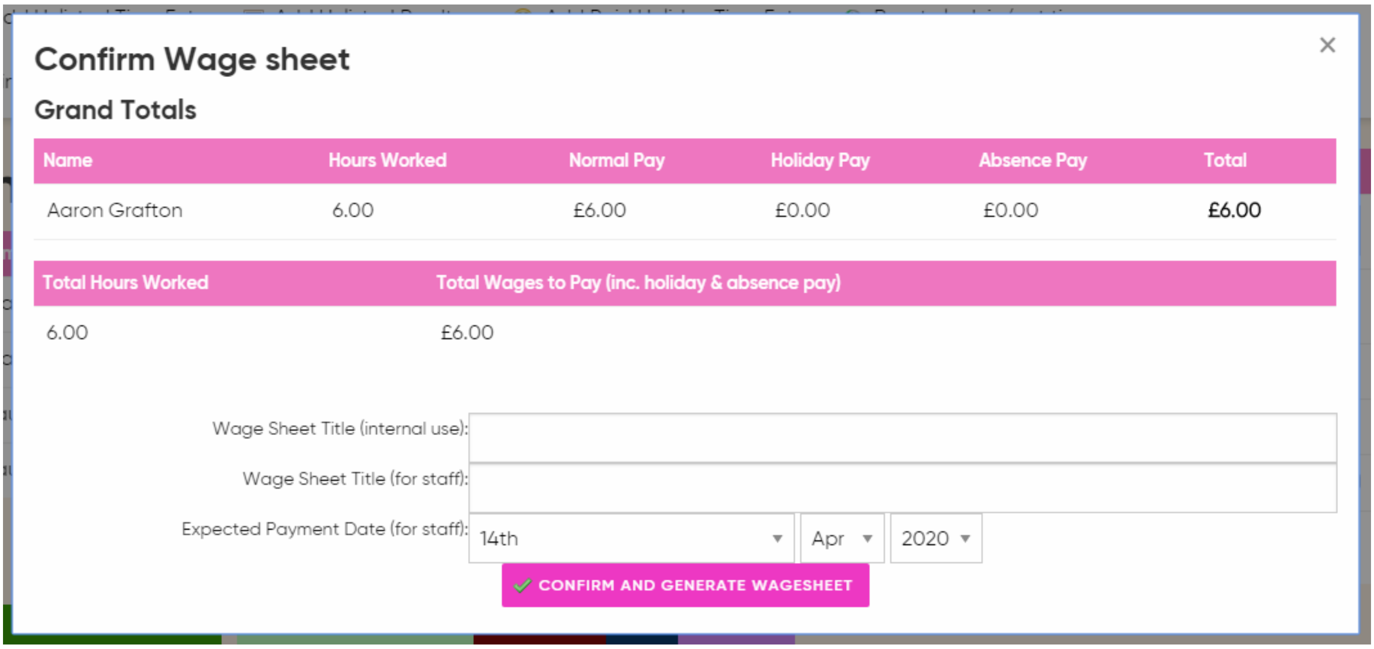

### 8.7.1. Creating a Wage sheet

The normal process is for a single wage sheet to be created from all venues via the Wagesheet page. If you need to create smaller wage sheets or special wage sheets that just cover certain shifts or time ranges within a single venue then you can do that from this page.

Once you are happy with the shift information you can choose to confirm or finalise selected or all shifts (click the Actions button in the menu to see these options).

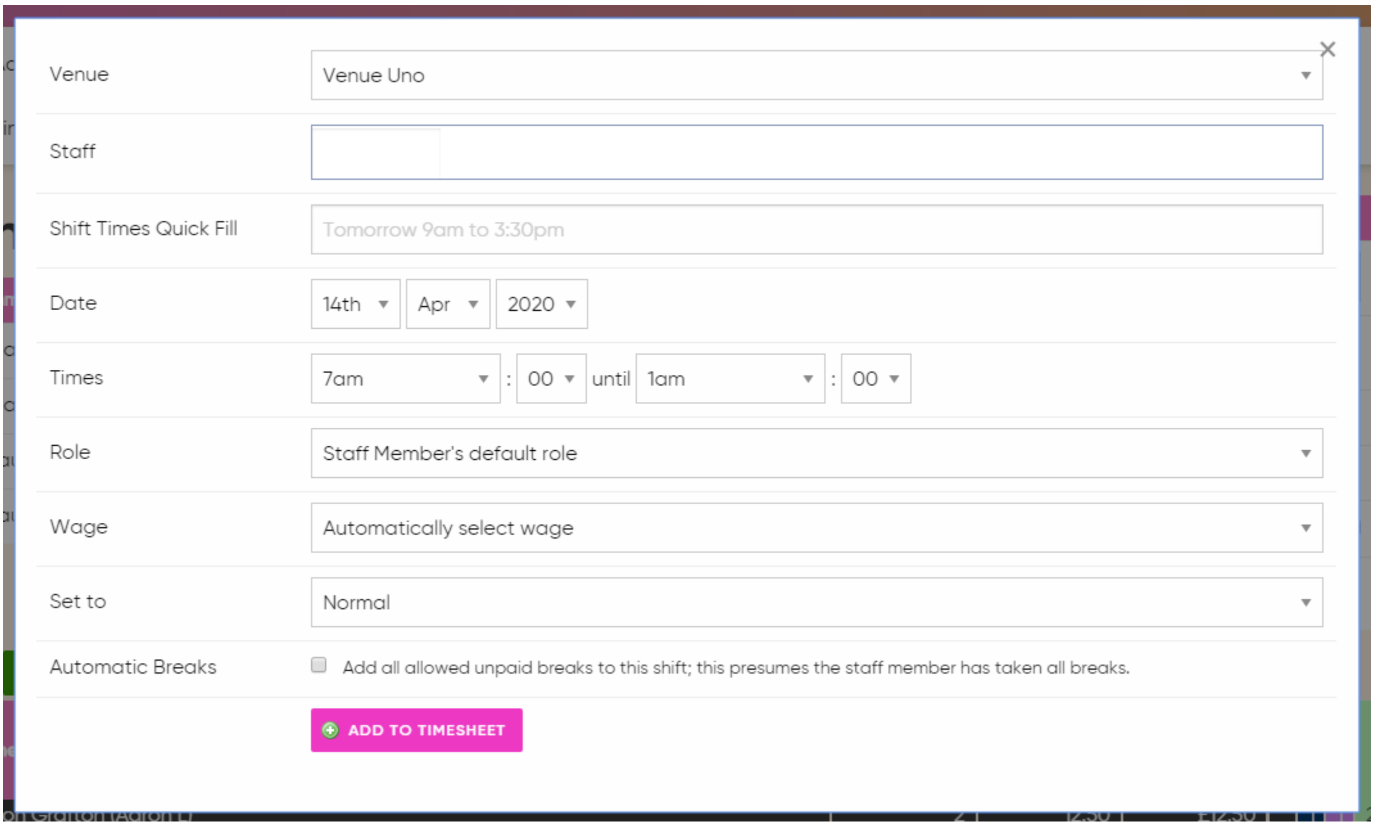
You can also add an optional wage sheet caption, which appears on the Wage Sheet list. Once you're happy with the information, click "Confirm and generate wage sheet". This will then process the shifts and generate the wage sheet.




## 8.7.2. Adding Unlisted Time Entries

You are able to add a time entry that is not listed or a paid holiday shift to the list so that it can be processed. Click “Add unlisted time entries” or “Add Paid Holiday Shift” from “Actions” within the menu. You will be presented with a form about that particular shift - the staff member, hours worked, role, and so on. Complete this then click “Add Clock Timesheet”. This will then add the shift to the list for processing.

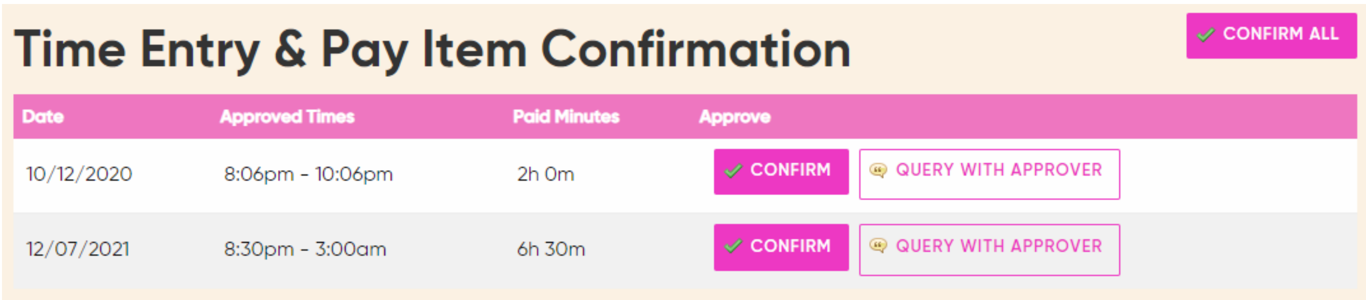


## 8.8. Time Entry Confirmation by Staff

This contract option requires staff to confirm each time entry before it will be included in a wage sheet.

Managers still review and approve time entries at which point staff will receive notifications on their dashboards that there are time entries to confirm.

They can then review and confirm each one. Only confirmed time entries will be processed into wage sheets.




If the time entries are edited once confirmed by the staff member then their status resets and they will need to be confirmed again.

Enable the Time Entry confirmation option under the Shifts & Time entries tab when editing a Contract.

## 8.9. Wage sheets

A wage sheet is simply a collection of approved time entries that have been grouped together for payment. Once they are in a wage sheet then the hours are locked and no editing can be done.

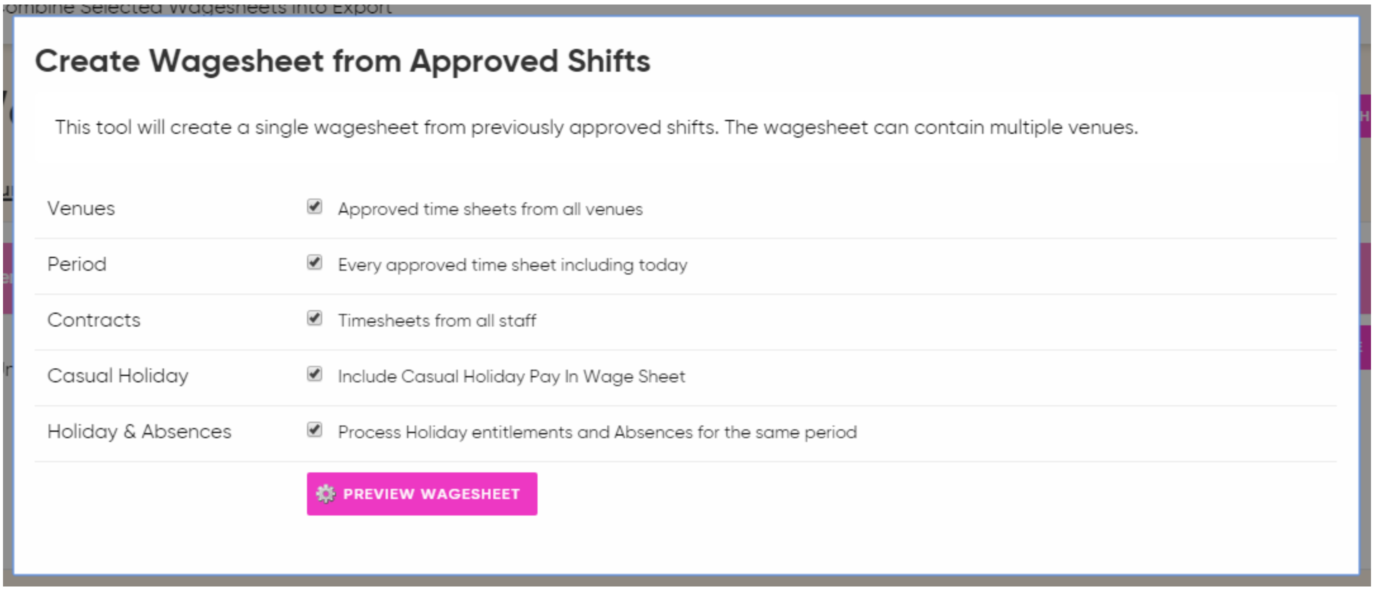
### 8.9.1. Creating a Wage sheet from approved time entries

The most efficient way to process time entries, pay items and expenses is to simply create a wage sheet from all of the approved time entries. You can do this from the Control Wage sheets page. There is a button in the top right called Create Wage sheet.

It will display a set of options that allow you to choose venues, a cut of time for shifts and employee contracts.

The time period option is normally used for paying staff for shifts up to the end of a period (week, fortnight or month) several days after the end of the period and not including anything worked since then. This process is designed to include all approved time entries up to the cut of time so that nothing is missed accidentally.
It’s important to note that midnight is the start of the day so 12:00am on Friday 10th of Jan is midnight between Thursday and Friday.




The contracts filter allows you to choose certain staff members to be included. This allows you to pay some staff weekly, some fortnightly and some monthly (or any combination).

The casual holiday option allows you to split automatic holiday pay into a different wage sheet. This allows the holiday pay to be kept back and paid on a different schedule. You can either create a new wage sheet or assign the holiday pay to another holiday wage sheet.

### 8.9.1.1. Unapproved Times Warning

If there are any unapproved time entries that are in the selected venues, time period and contracts that will not be included in the wage sheet then a warning will be displayed.

The warning will tell you how many shifts are unapproved and in which venue.

You can still continue and create the wage sheet; it will simply not include these time entries. They will be included in the next wage sheet once they have been approved.

### 8.9.1.2. Long Duration Time Entry Warning

The system will automatically warn if a time entry is over a set number of hours. The default is 12 hours but this can be configured in the global settings.

Any time entry this long or longer will be displayed so it can be checked.

### 8.9.2. Viewing Wage sheets

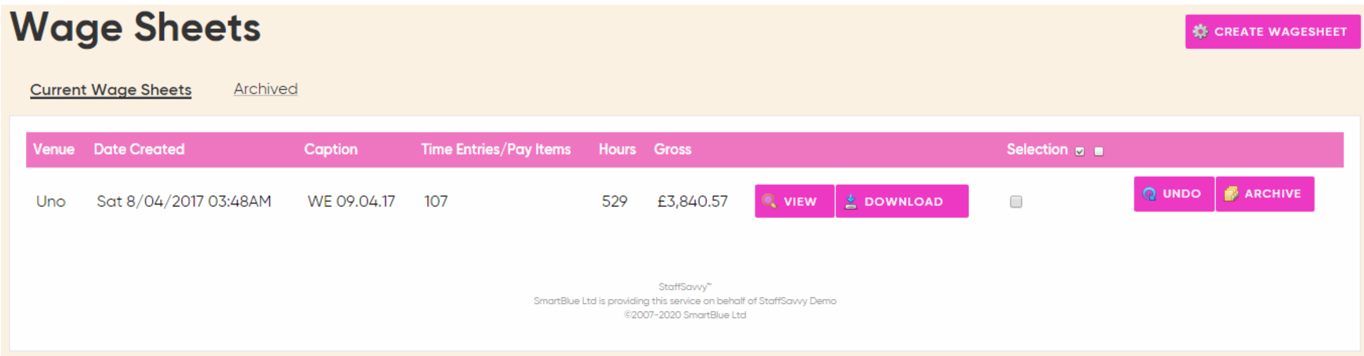
You can view all previous wage sheets under Pay > View Wage Sheets. You can see the overall information about that wage sheet, including the date created, number of shifts involved, hours worked, net & holiday pay (if enabled) and the total wage value.

These can be downloaded  or viewed within the browser. Within the “Actions” area of the menu, you can also combine multiple wage sheets into a single export. Various formats are available, you can enable each format under the Global Settings.

On the Current Wage Sheets tab, you can download single wage sheets, merge wage sheets for download and even undo a wage sheet. Undoing a wage sheet will return all of the wages back for final approval. Automatic holidays will be removed and the wage sheet record will vanish.

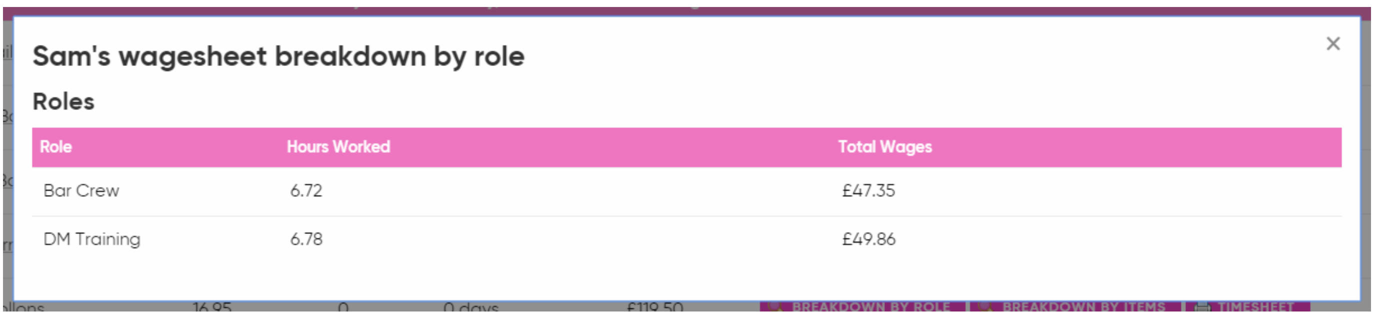
This will allow you to then create a new wage sheet once any adjustments or corrections have been made.

Once you are happy with the wage sheet and you have processed your pay on your payroll software then you can “archive” the wage sheet. This will move it to the archived tab so you know it is complete and finished.




Please note that Archived wage sheets cannot be merged together or undone. They are for historical records only.

Clicking the View button shows you the particular wage sheet in more detail. From here you can then see a breakdown of each staff member’s pay by role or by shift.



### 8.9.3. Downloading Wage sheet Data

The wage sheet data can be downloaded in multiple formats. Most of the export formats require configuration to ensure they produce the correct data to be used by third-party services such as Sage Payroll or Pegasus Opera. The export formats marked with a * below will only be enabled if you require this format. You can have multiple formats enabled; please speak to us if this is required.

When downloading a file, the system will check to ensure that the correct information has been provided to populate the file. For example, the Sage Payroll file will check that all staff in the wage sheet.

#### 8.9.3.1. CSV

This format will produce a list of each staff member's name with the number of hours they are owed per pay element. Each pay element will be listed on a different line so staff can appear in multiple rows. This is followed by the hourly rate in your currency and the total hours in decimal minutes.

| | | | |
|---|---|---|---|
| Rob abashekh | TOFS rate 1 | 7.05 | 5.82 |
| Joy Ashurst | TOFS rate 1 | 7.05 | 11.87 |
| Stephanie Ashurst | TOFS rate 1 | 7.05 | 5.03 |
| Stephanie Ashurst | Ents rate 1 | 7.05 | 5.55 |
| Michael atkin | TOFS rate 1 | 7.05 | 10.12 |
| Sara Bailey | TOFS rate 1 | 7.05 | 4.95 |
| Heather Brandum | Ents rate 1 | 7.05 | 3.8 |
| James Burtally | Ents rate 3 | 7.35 | 7.03 |
| Joseph Camps | TOFS rate 1 | 7.05 | 10.25 |
| Alice carstairs | TOFS rate 1 | 7.05 | 6.77 |
| Emma Carter | TOFS rate 1 | 7.05 | 11.1 |

#### 8.9.3.2. Sage 50 Accounts File*

This file is formatted for use with Sage. The file includes your staff member's Employee number used in Sage followed by the Sage payment reference to use and the decimal hours and decimal hourly rate.

This format requires the Payment Reference to be set on the Pay Element Account plus the employee's Sage reference being assigned.

| Employee Reference | Payment Reference | Hours | Rate |
|---|---|---|---|
| 3135 | 11 | 5.82 | 7.05 |
| 3157 | 11 | 11.87 | 7.05 |
| 3188 | 11 | 5.03 | 7.05 |
| 3188 | 21 | 5.55 | 7.05 |
| 3214 | 11 | 10.12 | 7.05 |
| 3225 | 11 | 4.95 | 7.05 |
| 3111 | 21 | 3.8 | 7.05 |
| 2856 | 23 | 7.03 | 7.35 |
| 3194 | 11 | 10.25 | 7.05 |
| 3120 | 11 | 6.77 | 7.05 |

## 8.9.3.3. Sage Payroll

We provide two different formats for Sage Payroll; both the official default format their documentation recommends and a custom format that can be used with a custom import template. This provides names of employees and removes their rate of pay so Safe Payroll will use the rates set on their account.

### 8.9.3.3.1. Sage Payroll File: Default Format*

This format is designed for Sage Payroll Column A is Sage Payroll employee reference, Column B is the pay element ID, column C is the decimal hours worked and column D is the hourly rate.

This format requires the employee's Sage Payroll  reference being assigned. This can be done via Staff > Staff Settings > Manage Staff.

You will also need to assign the payment reference (Pay Element ID) to each pay element. This is configured under the Payroll / Journal Reconciliation section of each Pay Element.

| Employee Reference | Payment Reference | Hours | Rate |
|---|---|---|---|
| 3135 | 11 | 5.82 | 1.00 |
| 3157 | 13 | 11.87 | 2.00 |
| 3188 | 11 | 5.03 | 1.00 |
| 3188 | 14 | 5.55 | 2.00 |
| 3214 | 11 | 10.12 | 1.00 |
| 3225 | 11 | 4.95 | 1.00 |
| 3111 | 11 | 3.8 | 1.00 |
| 2856 | 11 | 7.03 | 1.00 |
| 3194 | 12 | 10.25 | 1.00 |
| 3120 | 14 | 6.77 | 1.00 |
| 3134 | 11 | 0 | 1.00 |

#### 8.9.3.3.2. Sage Payroll File: With Names*

This format is designed for Sage Payroll. It is similar to the default format but provides an employee name and drops the rate of pay column. This format can be imported to Sage Payroll using a custom import template you create within Sage Payroll.

Column A is the employee name, column B is Sage Payroll employee reference, column C is the pay element ID and column D is the decimal hours worked.

This format requires the employee's Sage Payroll reference being assigned. This can be done via the Manage Staff page under Staff > Staff Settings.

You will also need to assign the payment reference (Pay Element ID) to each pay element. This is configured under the Payroll / Journal Reconciliation section of each Pay Element.

| Name | Employee Reference | Payment Reference | Hours |
|---|---|---|---|
| James Andrew | 3135 | 11 | 5.82 |
| Andrea Franks | 3157 | 13 | 11.87 |

| | | | |
|---|---|---|---|
| John Hopkin | 3188 | 11 | 5.03 |
| James Edwards | 3188 | 14 | 5.55 |
| Stephanie Jones | 3214 | 11 | 10.12 |
| Tom Aindow | 3225 | 11 | 4.95 |
| Jennifer Jenkins | 3111 | 11 | 3.8 |
| Annabell Rice | 2856 | 11 | 7.03 |
| Thea Bolton | 3194 | 12 | 10.25 |
| Boris Hugo | 3120 | 14 | 6.77 |
| Peter Westwood | 3134 | 11 | 0 |

#### 8.9.3.3.3. Dealing with multiple rates per Sagepay Element ID

Sage Payroll badly handles multiple rates of pay per Pay Element Id. It will simply error or fail to import a second line for the same Sage Payroll Pay Element Id. This means that pay might be missed.

To resolve this issue, StaffSavvy will export just one line per SagePay Element Id. If there are multiple rates of pay for that Pay Element Id (e.g. the rate of pay changed mid-month), then the export will report the highest rate of pay.

We will then also add an “adjustment” line to that staff member. This adjustment line will contain a negative number to adjust the gross pay back down to the correct level for the wage sheet.

**The Sage Payroll Element Id that you want the system to use for this adjustment line must be set under the Global Settings for Sage Payroll.**

### 8.9.3.4. Sage Payroll Bureau File*

This is a human readable format designed to support a format used by external Sage Payroll Bureaus. The format includes full names, employee numbers, departments and holiday hours. The format also allows for manual edits to be made in pre-set columns.

This format requires the Sage Payroll Rule to be set in Pay Elements, plus the employee’s Sage reference being assigned.

### 8.9.3.5. Midland iTrent Export File*

This format is designed to be used with Midland iTrent and supports the iTrent employee numbers, Element codes and cost codes.

This format requires the Element code to be set on the pay element, the default Cost Code set per Venue plus the employee's iTrent reference being assigned.

You can also decide on additional information and split the time entries per occupancy code or employee references based on how your iTrent system is configured.

### 8.9.3.5.1. Export per_ref_no (one reference per staff member)

This is the default option. Every employee has a single employee reference that is assigned via Manage Staff. This is used for all time entries)

### 8.9.3.5.2. Export occ_ref_no (one occupancy reference per staff member per venue)

This allows you to specify different occupancy references per staff member per venue. It allows you to assign the staff costs to different cost centres within iTrent. The default occupancy reference is still assigned via Manage Staff but other occupancy references can then be assigned for each employee for each of the venues where they work.
When this mode is enabled, an additional column is added to the Manage Venues page (under the employee's profile page and click Actions menu to find this page).

Here you can then set the occupancy code per venue. If no code is provided then the system will use the employee's default code set on the Manage Staff page.

| Staff Member | Home Venue | Access to Venue? | iTrent Occ Ref |
|---|---|---|---|
| Administration | ○ | ☑ | Defaulted to: 482948 |
| Community Wardens | ○ | ☑ | 29403912 |
| Dylans Kitchen and Bar | ● | ☑ | Defaulted to: 482948 |
| Insight & Policy | ○ | ☑ | 345342324 |

### 8.9.3.5.3. Export reference per role (one reference per staff member per role)

This allows you to override the employee's iTrent reference for particular roles so that they can be assigned to different cost centres in iTrent.

Cost codes can also be overwritten per day on Manage Shifts and on each time entry under Daily Shift Review or Unprocessed Pay.

### 8.9.3.6. StaffSavvy Simple One*

This format is designed to be the start of a manual process to provide hours to a third party. The export includes employee names, employee numbers, total pay, total hours and breakdowns of hours for holiday and sickness.

The export also breaks the hours per venue (not per venue export name but the actual venue name) and also per rate.

Total hours are shown along with a total cost per that rate.

Additional columns such as gratuity, additions and deductions can be edited/added outside of StaffSavvy.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Week Endi | Week No | Date Paid | | | | | | | | | | | |
| 2 | DD/MM/Y | XX | DD/MM/YYYY | | | | | | | | | | | |
| 3 | Name | Employee | Dept. | Contracte | Rate | Hours | Salary | Holiday | Gratuity | Additions | Sub-Total | Deductior | Total | Notes |
| 4 | James Bailey | | Uno | Var | 7.35 | 4.066667 | 29.89 | 0 | | | | | | |
| 5 | Jesica Bailey | | Uno | Var | 7.05 | 7.25 | 51.11 | 0 | | | | | | |
| 6 | Sam barnsdale | | Uno | Var | 7.05 | 5.05 | 35.6 | 0 | | | | | | |
| 7 | Peter Bollons | | Uno | Var | 7.05 | 14 | 98.7 | 0 | | | | | | |
| 8 | Charlotte Boyton | | Uno | Var | 7.05 | 5.95 | 41.95 | 0 | | | | | | |
| 9 | Charlotte Boyton | | Uno | Var | 7.35 | 11.51667 | 84.65 | 0 | | | | | | |
| 10 | Alice Brinkley | | Uno | Var | 7.05 | 5.716667 | 40.3 | 0 | | | | | | |
| 11 | Heather Bryant | | Uno | Var | 7.05 | 6.533333 | 46.06 | 0 | | | | | | |
| 12 | Anisha Burrows | | Uno | Var | 7.05 | 6.05 | 42.65 | 0 | | | | | | |
| 13 | Tara Connell | | Uno | Var | 7.05 | 5.75 | 40.54 | 0 | | | | | | |
| 14 | Jack Dart | | Uno | Var | 7.05 | 6.733333 | 47.47 | 0 | | | | | | |
| 15 | Joseph Forni | | Uno | Var | 7.05 | 8.866667 | 62.51 | 0 | | | | | | |
| 16 | Alice Garvie | | Uno | Var | 7.05 | 5.183333 | 36.54 | 0 | | | | | | |
| 17 | Johnny Gerrard | | Uno | Var | 7.05 | 11.1 | 78.26 | 0 | | | | | | |
| 18 | Emmeline Gibson | | Uno | Var | 7.05 | 5.183333 | 36.54 | 0 | | | | | | |

### 8.9.3.7. Pegasus Opera 3*

This format is designed to create the standard import format used by Pegasus Opera 3.

To create the format, the system needs to know the Transaction Code on each pay element. Set this under the Pay > Pay Settings > Pay Elements. Any pay rates with the same Transaction Codes will be merged together in the exported file.

Each employee will also need their Opera Employee Reference number. Set this under Staff > Staff Settings > Manage Staff.

### 8.9.3.8. Exchequer Journal*

Contents and details to be confirmed following approval of this format.

### 8.9.3.9. ADP Freedom*

This format works with the ADP Freedom software. It allows for a staff employee reference, cost centre code and earn code to be assigned.

The format also includes GL BUS Code but this will use the cost centre code.

| Employee_code | EARN_CODE | EE_EARN_AMT | EE_EARN_QTY | EE_EARN_RATE | COST_CENTRE_CODE | GL_BUS_CODE | TRANS_DATE |
|---|---|---|---|---|---|---|---|
| 625833 | TEAM | | 1 | | ENTS | ENTS | 23/01/2017 |
| 485932 | TEAM | | 1 | | ENTS | ENTS | 06/02/2017 |
| 484932 | TEAM | | 1 | | ENTS | ENTS | 13/02/2017 |
| 484932 | TEAM | | 1.42 | | SHOP | SHOP | 15/02/2017 |
| 284921 | FINANCE | | 3 | | OFFICE | OFFICE | 15/02/2017 |
| 222374 | ENTS | | 8.25 | | ENTS | ENTS | 15/02/2017 |

### 8.9.3.10. Miracle*

This format works with the MircalePay NAV software. It allows for a staff employee reference, global dimension codes and job titles.

To configure this, you will need to assign each employee their Miracle reference under Staff > Staff Settings > Manage staff. To allow a MiraclePay reference number to be added go to Global Settings > Payroll.

Each venue will then need to have its Miracle Global Dimension 1 Code assigned. Go to System > Venues > Manage Venues and set the dimension 1 code as needed.

Finally the details about each pay element account needs to be set. Go to Pay > Pay Settings > Pay Element Accounts. Set both the Miracle Global Dimension 2 Code and the Miracle Column Title. The column title is used to determine which columns should be added to the Miracle export format.

### 8.9.3.11. Carval*

This format works with the Carval HR software and provides the correct payroll numbers and cost centres to export the data in an importable format.

All staff need their Carval employee references set. Do this under Staff > Staff Settings > Manage Staff. You should then see a column for each staff member's Carval Employee reference. Every staff member just needs to have their reference added. To allow a Carval reference number to be added go to Global Settings > Payroll.

The Carval cost centres are the codes used to link the hourly rates of pay to the department. These are managed via Pay Element Accounts (Pay > Pay Settings > Pay Element Accounts). You'll need a Pay Element account for each Carval cost centre.

### 8.9.3.12. Raw Data including shift breakdown

This format will export every time entry for each employee within the wage sheet. It will include an employee number, their names, a name per venue, date worked, start and end times, hours, hourly rate and gross pay.

| OCCUPANCY REF | FIRST NAME | LAST NAME | VENUE | WORK ORDER | DATE | START | END | HOURS | WAGE | VALUE |
|---|---|---|---|---|---|---|---|---|---|---|
| | Rob | abashekh | Old Fire Station | | 2017-04-06 | 21:45 | 03:35 | 5.82 | 7.05 | 41.01 |
| | Joy | Ashurst | Old Fire Station | | 2017-04-06 | 20:30 | 03:45 | 6.75 | 7.05 | 47.59 |
| | Joy | Ashurst | Old Fire Station | | 2017-04-07 | 22:32 | 03:38 | 5.12 | 7.05 | 36.07 |
| | Stephanie | Ashurst | Old Fire Station | | 2017-04-07 | 22:30 | 03:32 | 5.03 | 7.05 | 35.49 |
| | Stephanie | Ashurst | Old Fire Station | | 2017-04-06 | 22:00 | 03:32 | 5.55 | 7.05 | 39.13 |
| | Michael | atkin | Old Fire Station | | 2017-04-06 | 22:30 | 03:34 | 5.07 | 7.05 | 35.72 |
| | Michael | atkin | Old Fire Station | | 2017-04-07 | 22:30 | 03:33 | 5.05 | 7.05 | 35.6 |
| | Sara | Bailey | Old Fire Station | | 2017-04-07 | 22:32 | 03:29 | 4.95 | 7.05 | 34.9 |

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Heather | Brandum | Old Fire Station | | 2017-04-07 | 20:30 | 00:18 | 3.8 | 7.05 | 26.79 |

### 8.9.3.13. Excel Export Format 1

**Note: This format can be enabled under Global Settings.**

Excel Format 1 is designed to provide a summary of all time entries to be transcribed to another system. It will also highlight staff on permanent and casual contracts.

Hours are shown as a total number of hours that includes holiday and sick pay. The notes column provides a breakdown of holiday and sick page hours.

Yellow rows denote staff on casual contracts, white rows are everyone else.

| | A | B | C |
|---|---|---|---|
| 1 | WE 3.4.17 | | **Weekly** |
| 2 | Only showing entries from 26/03/2017 | | **Monthly** |
| 3 | **Staff** | **Hours after breaks** | **Comments** |
| 4 | James Bailey | 4.07 | |
| 5 | Jesica Bailey | 7.25 | |
| 6 | Sam barnsdale | 5.05 | |
| 7 | Peter Bollons | 14 | |
| 8 | Charlotte Boyton | 17.47 | |
| 9 | Alice Brinkley | 5.72 | |
| 10 | Heather Bryant | 6.53 | |
| 11 | Anisha Burrows | 6.05 | |
| 12 | Tara Connell | 5.75 | |
| 13 | Jack Dart | 6.73 | |
| 14 | Joseph Forni | 8.87 | |
| 15 | Alice Garvie | 5.18 | |
| 16 | Johnny Gerrard | 11.1 | |
| 17 | Emmeline Gibson | 5.18 | |
| 18 | Millicent Gibson | 4.98 | |
| 19 | Charlie Gilfoy | 4.63 | |
| 20 | Harry Grafton | 8.32 | |

### 8.9.3.14. Excel Export Format 2

Note: This format can be enabled under Global Settings.

Excel Format 2 provides a breakdown of hours per staff member per venue export name. It allows total costs (not hours) to be seen per cost centre and provides breakdown of working, holiday and sickness costs.

The Venue Export Name is set under each venue and hours from venues with the same export name will be combined. This allows you to create your own cost centres covering one or more venues and have this export display them separately.

Each staff member will be listed with the venue export name and the total costs. If the staff member has worked in multiple venues that have multiple export names then they will be listed several times. If the venues all share the same export name then only one line will be shown.

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | WE 3.4.17 | | | | |
| 2 | **Staff** | **Rate** | **Hours after breaks** | **Holiday hours** | **Sickness hours** |
| 3 | James Bailey | 7.35 | 4.07 | 0 | 0 |
| 4 | Jesica Bailey | 7.05 | 7.25 | 0 | 0 |
| 5 | Sam barnsdale | 7.05 | 5.05 | 0 | 0 |
| 6 | Peter Bollons | 7.05 | 14 | 0 | 0 |
| 7 | Charlotte Boyton | 7.05 | 5.95 | 0 | 0 |
| 8 | Charlotte Boyton | 7.35 | 11.52 | 0 | 0 |
| 9 | Alice Brinkley | 7.05 | 5.72 | 0 | 0 |
| 10 | Heather Bryant | 7.05 | 6.53 | 0 | 0 |
| 11 | Anisha Burrows | 7.05 | 6.05 | 0 | 0 |
| 12 | Tara Connell | 7.05 | 5.75 | 0 | 0 |
| 13 | Jack Dart | 7.05 | 6.73 | 0 | 0 |
| 14 | Joseph Forni | 7.05 | 8.87 | 0 | 0 |
| 15 | Alice Garvie | 7.05 | 5.18 | 0 | 0 |
| 16 | Johnny Gerrard | 7.05 | 11.1 | 0 | 0 |
| 17 | Emmeline Gibson | 7.05 | 5.18 | 0 | 0 |
| 18 | Millicent Gibson | 7.05 | 4.98 | 0 | 0 |
| 19 | Charlie Gilfoy | 7.05 | 4.63 | 0 | 0 |
| 20 | Harry Grafton | 7.05 | 8.32 | 0 | 0 |
| 21 | Megan Green | 7.05 | 3.02 | 0 | 0 |

### 8.9.3.15. Excel Export Format 3

Note: This format can be enabled under Global Settings.

Excel Format 1 is designed to provide a summary of all time entries to be transcribed to another system. It will also highlight staff on permanent and casual contracts.

Hours are shown as a total number of hours that includes holiday and sick pay. The notes column provides a breakdown of holiday and sick page hours.

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | WE 3.4.17 | | | | |
| 2 | **Staff** | **Venue Ref** | **Normal Pay (£)** | **Holiday Pay (£)** | **Sickness Pay (£)** |
| 3 | James Bailey | | 29.89 | 0 | 0 |
| 4 | Jesica Bailey | | 51.11 | 0 | 0 |
| 5 | Sam barnsdale | | 35.6 | 0 | 0 |
| 6 | Peter Bollons | | 98.7 | 0 | 0 |
| 7 | Charlotte Boyton | | 126.6 | 0 | 0 |
| 8 | Alice Brinkley | | 40.3 | 0 | 0 |
| 9 | Heather Bryant | | 46.06 | 0 | 0 |
| 10 | Anisha Burrows | | 42.65 | 0 | 0 |
| 11 | Tara Connell | | 40.54 | 0 | 0 |
| 12 | Jack Dart | | 47.47 | 0 | 0 |
| 13 | Joseph Forni | | 62.51 | 0 | 0 |
| 14 | Alice Garvie | | 36.54 | 0 | 0 |
| 15 | Johnny Gerrard | | 78.26 | 0 | 0 |
| 16 | Emmeline Gibson | | 36.54 | 0 | 0 |
| 17 | Millicent Gibson | | 35.13 | 0 | 0 |
| 18 | Charlie Gilfoy | | 32.67 | 0 | 0 |
| 19 | Harry Grafton | | 58.63 | 0 | 0 |
| 20 | Megan Green | | 21.27 | 0 | 0 |
| 21 | Georgia Harding | | 33.84 | 0 | 0 |

### 8.9.3.16. Excel Export Format 4

Note: This format can be enabled under Global Settings.

Excel Format 4 is designed to provide a total cost per venue export name. This can then be used for journal entries.

| | A | B |
|---|---|---|
| 1 | WE 3.4.17 | |
| 2 | **Venue Ref** | **Total Expenditure** |
| 3 | VO | 3343.17 |
| 4 | | |
| 5 | | |

The total is provided as a cost in pounds (£) for each of the different venue export names.

Any venue with the same export names will be combined into a single line in this export.

This allows different cost centres to be created that might include several venues under one export name.

### 8.9.3.17. Excel Export Format 5

Note: This format can be enabled under Global Settings.

This format is designed to provide wage sheet information in a format for import. This format includes the Sage Reference from each employee, their full name, hours to be paid, rate of pay and cost code.

The cost code is taken from the venue where the work was completed. You can set this per venue as the “title for exports”.

Shifts with the same venue, rate of pay and employee will be combined together into one row. Staff who work multiple pages or for different rates of pay will be listed multiple times.

| | A | B | C | D | E | F | G | H | I | J |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | | | | WEEK ENDING: | WE 24.01.10 | | | | |
| 2 | | | | | PAY DAY: | | | | | |
| 3 | | | | | CHARGED TO: | | | | | |
| 4 | | | | | AUTHORISED SIG: | | | | | |
| 5 | Ref | Full Name | | Grade | Hours Adjustment | Hourly Rate of Pay | Cost Code | Sick | Comments/Notes | |
| 6 | | Nick | Bailey | | 31.9 | 5.8 | XX | | | |
| 7 | 1606 | Jon | Barr | | 89.32 | 5.8 | XX | | | |
| 8 | | Robert | Barrow | | 45.92 | 5.8 | XX | | | |
| 9 | | Amy | Beasley | | 30.74 | 5.8 | XX | | | |
| 10 | | Ben | Bennett | | 49.92 | 6.95 | XX | | | |
| 11 | | Harry | Bennett | | 17.21 | 5.8 | XX | | | |
| 12 | 1580 | Guillermo | bollons | | 73.08 | 5.8 | XX | | | |
| 13 | | David | brien | | 25.83 | 6.95 | XX | | | |
| 14 | | Terence | Burns | | 71.92 | 5.8 | XX | | | |
| 15 | 1604 | Jessica | carstairs | | 28.81 | 5.8 | XX | | | |
| 16 | | Tammy | carstairs | | 36.83 | 5.8 | XX | | | |
| 17 | 1631 | Nikki | Carter | | 35.77 | 5.8 | XX | | | |
| 18 | | rebecca | Carter | | 33.93 | 5.8 | XX | | | |

## 8.9.3.18. Excel Export Format 6

Note: This format can be enabled and renamed under Global Settings.

This format simply includes your employee reference number, names, normal pay as a total, holiday pay (if included), an empty advance pay for manual editing and a final gross pay column.

| Payroll Number | Surname/Forena | Normal Pay (£) | Holiday Pay (£) | Advance Pay (£) | Gross Pay (£) |
|---|---|---|---|---|---|
| 70 | BAILEY / Nick | 14.39 | 0 | 0 | 14.39 |
| | BARR / Jon | 0 | 0 | 0 | 0 |
| 0 | BARROW / Robert | 0 | 0 | 0 | 0 |
| 52 | BEASLEY / Amy | 6.79 | 0 | 0 | 6.79 |
| 14 | BENNETT / Ben | 0 | 0 | 0 | 0 |
| 15 | BIGGS / David | 18.82 | 0 | 0 | 18.82 |
| 30 | BOLLONS / Guillermo | 10.88 | 0 | 0 | 10.88 |
| 33 | BRIEN / David | 15.15 | 0 | 0 | 15.15 |
| 65 | BRYANT / Simon | 7.05 | 0 | 0 | 7.05 |
| 40 | BURNS / Terence | 7.3 | 0 | 0 | 7.3 |
| 83 | CARSTAIRS / Tammy | 19.93 | 0 | 0 | 19.93 |
| 53 | CARTER / Madeleine | 4.28 | 0 | 0 | 4.28 |
| 84 | CARTER / Nikki | 6.87 | 0 | 0 | 6.87 |
| 10 | CLARKE / Clare | 7.3 | 0 | 0 | 7.3 |

### 8.9.3.19. Excel Export Format 7

Note: This format can be enabled and renamed under System > Configuration > Global Settings > Payroll.

This format provides a raw export of rates and decimal hours for each employee. The column names for the rates and hours can be edited under the settings.

In addition, a notes column can be added and automatic notes applied for different contract types.

Each of the employee’s rates of pay will be listed and the totals shown.

| Payroll Number | Surname | First Name | Rate 1 | Hours 1 | Rate 2 | Hours 2 |
|---|---|---|---|---|---|---|
| 70 | BAILEY | NICK | 1.23 | 11.7 | | |
| | BARR | JON | 0 | 14.87 | | |
| 66 | LAAKSONEN | JONATHAN | 1.23 | 5.72 | 1 | 5.53 |
| 0 | BARROW | ROBERT | 0 | 30.98 | | |
| 52 | BEASLEY | AMY | 1.23 | 5.52 | | |
| 14 | BENNETT | BEN | 1 | 0 | | |
| 15 | BIGGS | DAVID | 1.23 | 15.3 | | |
| 30 | BOLLONS | GUILLERMO | 1.23 | 8.85 | | |
| 33 | BRIEN | DAVID | 1 | 15.15 | | |
| 65 | BRYANT | SIMON | 1.23 | 5.73 | | |
| 40 | BURNS | TERENCE | 1.23 | 5.93 | | |
| 83 | CARSTAIRS | TAMMY | 1.23 | 16.2 | | |
| 53 | CARTER | MADELEINE | 1.23 | 3.48 | | |
| 84 | CARTER | NIKKI | 1.23 | 5.58 | | |
| 10 | CLARKE | CLARE | 1.23 | 5.93 | | |
| 6 | COLLINS | CHRIS | 1 | 7.5 | | |
| 79 | COOPER | SAMANTHA | 1.23 | 12.12 | | |
| 37 | COWEN | JACK | 1.23 | 2.75 | | |

### 8.9.3.20. Excel Export Format 8

Note: This format can be enabled and renamed under System > Configuration > Global Settings > Configuration > Payroll.

This format provides a raw export of rates and decimal hours for each employee. The column names for the rates and hours can be edited under the settings.

Each of the employee's rates of pay will be listed and the totals shown. The file will automatically adjust based on the rates that are included in the file. Only rates of pay that one of the staff members has been paid within that wage sheet will be included.

The file also includes a subtotal column, number of holiday hours and total holiday value. Finally, it also shows a total pay.

### 8.9.3.21. Excel Export Format 9

Note: This format can be enabled and renamed under Global Settings.

This format will provide a total number of hours per staff member including the rate of pay, total hours and a grand cost. Staff will have multiple lines if they have multiple rates of pay per wage sheet.

| Reference | Staff | Rate | Hours after breaks | Row Total |
|---|---|---|---|---|
| 230 | James Bailey | 7.35 | 422 | 3101.7 |
| 230 | Jesica Bailey | 7.05 | 528 | 3722.4 |
| 44 | Sam barnsdale | 7.05 | 403 | 2841.15 |
| 44 | Sam barnsdale | 7.35 | 407 | 2991.45 |

### 8.9.3.22. Excel Export Format 10

Note: This format can be enabled and renamed under Global Settings.

This format provides an export of all wage sheet costs grouped per venue, Cost Code 1 and Cost Code 2.

It is perfect to provide a total value of time sheet per cost code during the wage sheet.

| WE 09.04.22 | | | |
|---|---|---|---|
| **Venue** | **Cost Code 1** | **Cost Code 2** | **Total Expenditure** |
| Example 1 | | | 3840.57 |
| Example 2 | | | 3840.57 |

### 8.9.3.23. Excel Export Format 11

Note: This format can be enabled and renamed under Global Settings.

This format creates an Excel file with the following columns:

- Reference
- First name
- Last name
- Date Worked
- Pay Element (special reference on each pay element)

- Hours (decimal)
- Event Cost Code (if provided)
- Venue (Using the Title for Exports)
- Custom Field (Ability to add a custom field to the export)

There will be a single row for each combination of staff, date worked, pay element, cost code and venue.

| Reference Number | First Name | Last Name | Date Worked | Pay Element | Hours | Event Cost Code | Venue | [Custom Field] |
|---|---|---|---|---|---|---|---|---|
| 10302310A | James | Bilal | 2019-05-29 | GRADE C | 3 | | Uno | |
| 10302310A | James | Bilal | 2019-05-31 | GRADE C | 2.5 | | Uno | |
| 0023AA | Amy | Chalakova | 2019-05-28 | GRADE C | 3.25 | | Uno | |
| 00013AM | Lara | Coull | 2019-05-31 | GRADE B U25 | 6.25 | | Uno | |

### 8.9.3.24. Excel Export Format 12

Note: This format can be enabled and renamed under Global Settings.

This is a cross-charge report that is designed to show the total cost per staff member where they have worked in a different venue from their home venue.

The report includes the employee name, their home venue and then a column for each venue in the system. The report will then include the value of hours under each column where they are not within the home venue.

| Staff | Home Venue | Uno | CH | Office | VO |
|---|---|---|---|---|---|
| Jake Bailey | VO | 234.56 | 0 | 0 | 0 |
| James Bailey | VO | 0 | 45.45 | 0 | 0 |
| Peter Bollons | Uno | 0 | 0 | 23.23 | 178.45 |

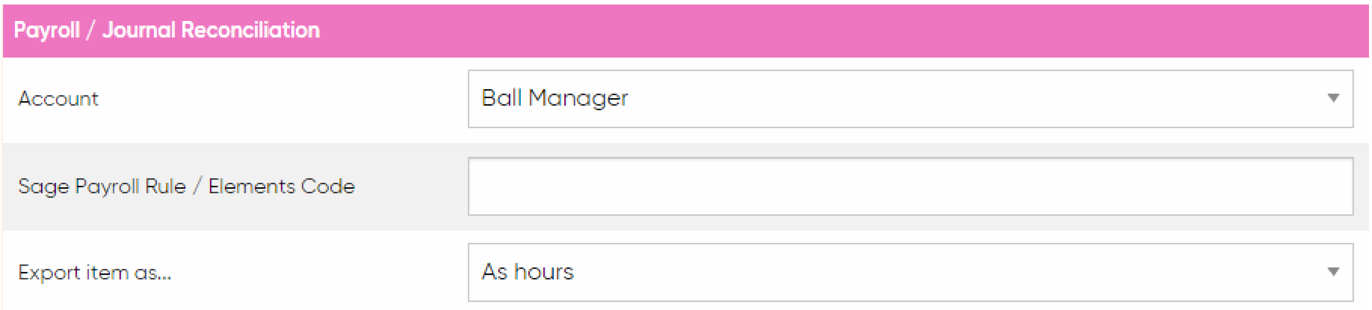
 

### 8.9.3.25. Excel Export Format 13

Note: This format can be enabled and renamed under Global Settings.

This format allows you to produce a report showing the “standard” hours for a staff member and a currency cost for any additional hours.

Once you’ve enabled the report, you will need to update the pay elements. Under the Payroll/Journal Reconciliation title, choose if that pay element will be exported as Hours or as Cash values.




Once set, this will tell the report format which pay items should be included in their regular hours or within the cash total.

This format creates an Excel file with the following columns:

- Staff Member’s Name
- Month that the item was earned (YY-MM format)
- Home Venue
- Rate of Pay (for standard hours)
- Number of standard hours
- Cash Addition
- Authorised (one of the authorising staff members)

Note: if the staff member has multiple pay elements that are marked as per hours OR standard rate of pay changes then they will have multiple rows in the file (one for each rate of pay for standard hours). Cash total will only be displayed on the first row for that staff member and won’t be repeated.

| Name | Month | Venue | Rate of Pay | Hours | Cash Addition | Authorised |
|---|---|---|---|---|---|---|
| John Smith | 21-02 | Uno | 10.00 | 50.25 | 25.00 | James Smith |
| Adam Jones | 21-02 | Bilal | 10.00 | 10.12 | 423.00 | James Smith |

| | | | | | | |
|---|---|---|---|---|---|---|
| Frank Clark | 21-02 | Coffee Hut | 10.00 | 105.0 | 3.25 | Anne Jones |
| James Bowen | 21-02 | Uno | 15.00 | 80.50 | 60.75 | James Smith |

### 8.9.3.26. Excel Export Format 14

Note: This format can be enabled and renamed under Global Settings.

This export produces a summary sheet of employee, contracted hours, additional hours, national holiday hours, different hour rates and sick pay deductions.

It contains the following columns:

- EmpNo
- Name
- Contract
- Contract hours during period of wage sheet
- Total hours worked (includes all rates)
- Additional Hours
- Bank Holiday Hours
- Hours at enhanced rate
- Hours at different rate
- Hours at different rate
- Deduct at Half Pay
- Deduct at Full Pay

### 8.9.3.27. Excel Export Format 15

Note: This format can be enabled and renamed under Global Settings.

This export produces a sheet containing employee numbers, names, post id per employee, payroll date range, regular hours, time x 1.5 hours, time x 2 hours plus a cost centre per venue.

The 1.5x and 2x hour columns will have the hours assigned to the correct column automatically if the paid hours are 1.5x the worked hours or 2x the worked hours respectively.

- Payroll number
- First name
- Surname

- POST ID (reference set per staff member on profile page)
- Date From
- Date To
- Plain Time
- Time x1.5
- Time x2
- Cost Centre (reference set per venue)

### 8.9.3.28. Excel Export Format 16

Note: This format can be enabled and renamed under Global Settings.

This export generates a sheet with payroll number, name and number of hours per the overtime reference assigned to each pay element. It also shows sickness hours and reasons.

On each pay element, you can set the column that the hours should be reported within; normal, overtime, 1.5x or 2x. This will split the hours into different columns automatically for you.

- Employee Number
- First name
- Last name
- Hours Columns
    - (multiple depending on the pay element codes set)
- Sickness hours
- Notes (includes breakdown of sickness hours)

### 8.9.4. Combining Wage Sheets

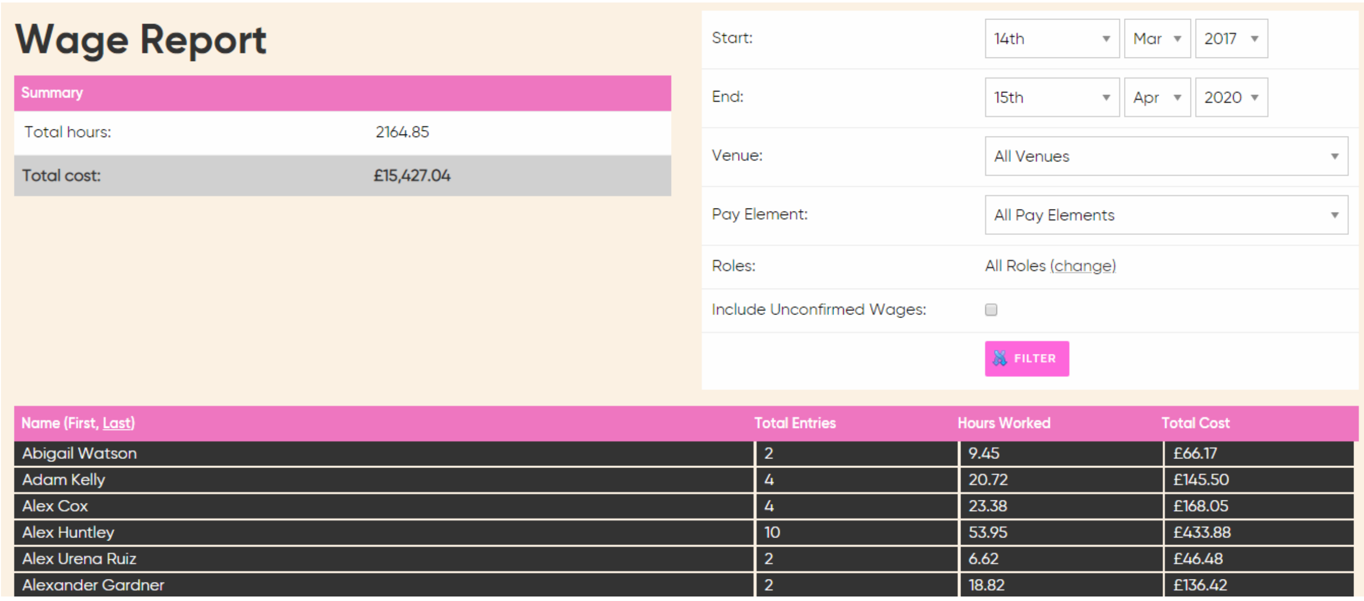
If you have created multiple wage sheets for any reason then you are able to combine them into a single file and export it in your preferred format.

Simply use the checkboxes on the View Wage sheet page to select the required wage sheets. Then use the 'Combine Selected Wage Sheets into Export' option under the Actions menu to download your preferred format.

## 8.10. Pay Report

The Pay Report provides a breakdown of all of the staff, their total shifts, total hours worked, and total pay within a period of time. It can be found under Reports > Time Entries & Pay > Pay. You can filter  the information you are looking for by; start/end dates, venue, pay element and roles. The bottom of the page shows you report groupings - a summary of the hours and costs for a group of pay elements in order to see a summary of a particular set of roles (see Pay Report Groupings for more information about creating these groups).

Clicking “Change” next to “All Roles” provides you with the list of roles available. You can select which roles are appropriate and choose to remember selection or save. Click “Filter” to generate the report.




| Report Grouping | Total Hours | Total Cost |
|---|---|---|
| Bar | 1261.82 | £8,977.75 |
| Ents | 677.30 | £4,859.32 |
| Security | 2164.85 | £15,427.04 |
| Promo Crew | 98.80 | £609.64 |

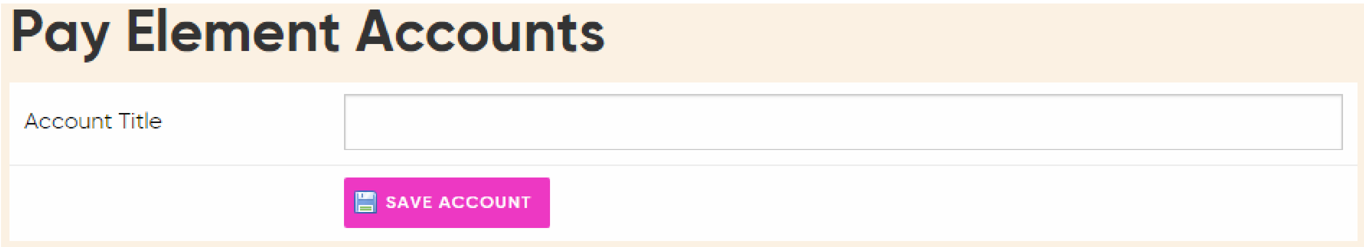
 

# 8.11. Pay Settings

## 8.11.1. Pay Element Accounts

Pay Element Accounts are used to associate the StaffSavvy details with Sage account software. Create Pay Element Accounts for each of your Pay Elements.

Depending on your selected payroll provider different information is likely to be shown here. For Sage 50 Accounts users, the nominal code reference is requested for example.



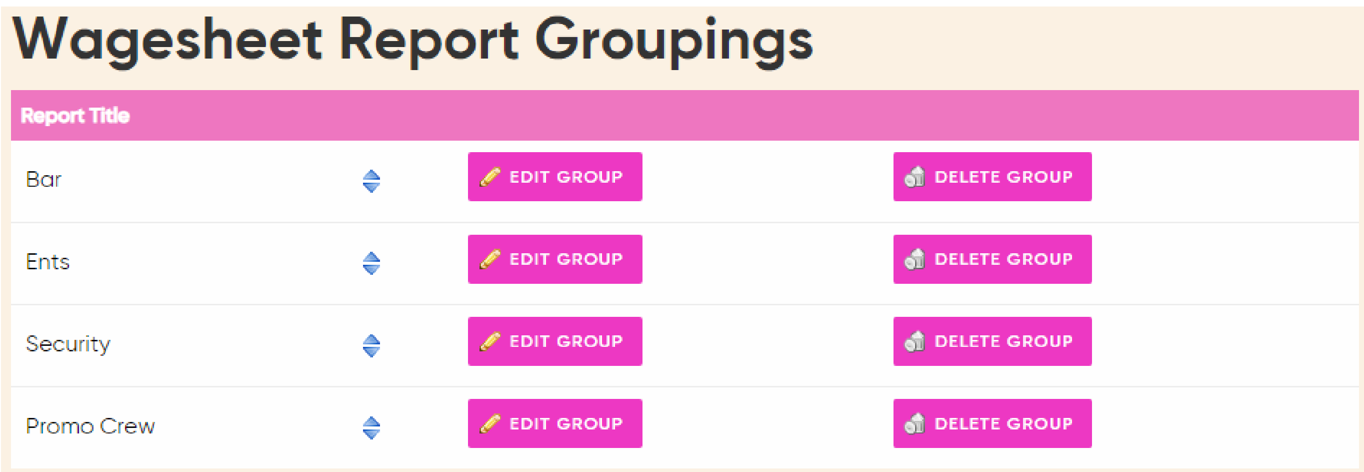

You can edit or delete existing Pay Element Accounts from the main list.

## 8.11.2. Wagesheet Notifications

Wagesheet Notifications simply allow you to be notified when wage sheets have been created.

## 8.11.3. Pay Report Groupings

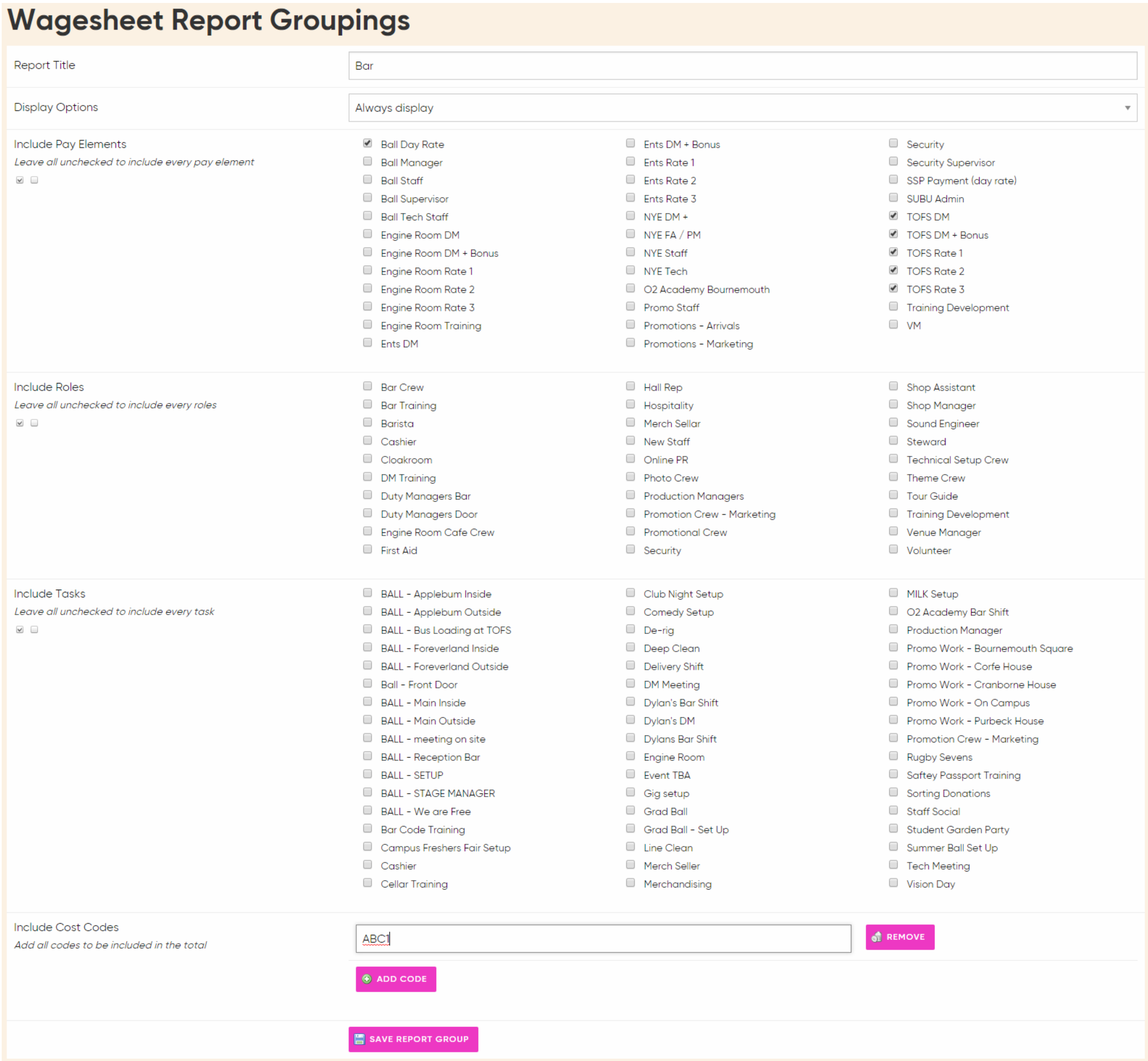
You can create Pay Report Groupings so that it is easier to see at a glance pay totals for a particular staff group. Existing reports can be edited or deleted from the system, as needed.




To create a new grouping, click “Create Report Group” from the “Actions” dropdown.

Add the appropriate report title so that it can be recognised from the main report grouping page, then select the relevant pay rates that you would like to include in the grouping.

You can also include cost codes that must be assigned to the report group. Only shifts or time entries with this exact cost code will be included. Cost codes are an optional setting that can be enabled on the Global Settings page.




Once you are happy with your selection, click “Save Report Group”.

These groupings will then appear at the bottom of the Pay Report page.

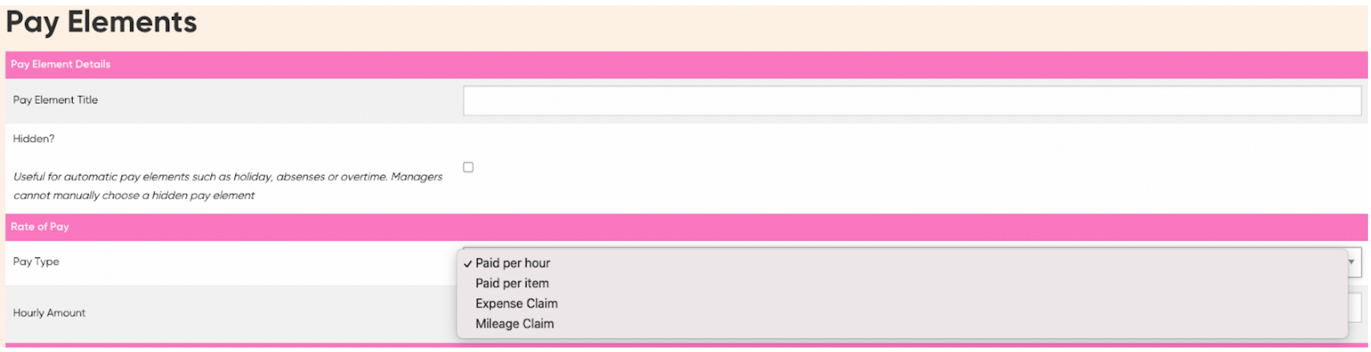
# 9. Expenses

This is a quick guide to getting your expenses setup within StaffSavvy. We've presumed you have enabled the expenses add-on as per the Introduction section instructions.

## 9.1. Expenses Pay Elements

Pay Elements form the cornerstone of the expense claim process. Each type of claim you wish to accept will be a pay element within the system.

This allows you to choose who can make that type of claim. Additionally, it allows you to include the references and data that your payroll system will need to process the payment.
When creating a new pay element, you will be asked to choose the type of pay. In this drop down, you'll see both Expense Claim and Mileage Claim. Expense claims can be any value whereas mileage claims are any distance multiplied by your amount per mile.




You can have multiple pay elements for different types of claims or for different cost centres that you wish to report upon.

# 9.1.1 Pay Element Permissions

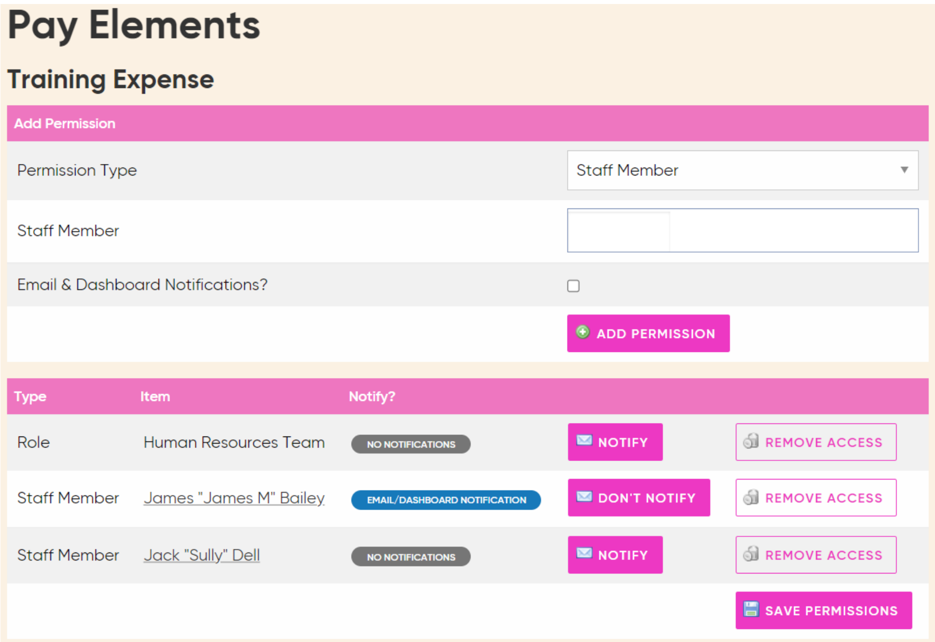
## 2.6. Pay Element Permissions

The permissions system allows you to specify who can approve a certain expense or mileage claim. This allows you to configure roles, squads and individuals who can approve that type of entry plus who should receive notifications about it.
This allows you to further refine who can approve each item; they must still have permission to approve the time entries.

To use these permissions go to your list of pay elements (Pay > Pay Settings > Pay Elements) Next to any of the expenses or mileage pay element types will be an Edit Approval Permissions button.

This will load a new Pay Elements Permissions page. At the top, you can add contacts, groups and squads to the list of people who can approve these time entries.

In addition to granting specific permissions, you can also state if they should be notified about new items for approval. This will be via email and dashboard notifications. So some teams can have approval permission but will not receive notifications while others will be notified directly.



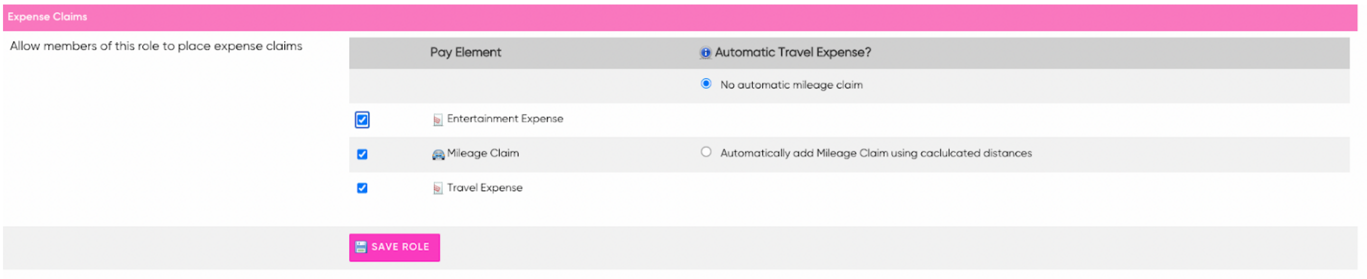
## 9.2. Role Expenses

Once you have your pay elements configured, you can then link them through to roles. This is how you confirm who can make which types of claim.

A staff member can only make a claim if the pay element is assigned to a role they are in. This prevents any staff member making any claim they wish in the system.

Under Staff > Staff Settings > Staff Roles. Edit a role you wish to assign the expense pay element to.

Click on the Pay tab at the top of the page. Under the general pay details for that role, you'll also find an Expense Claims section.




Simply choose which of the pay elements you wish to allow the role to claim against and click Save.

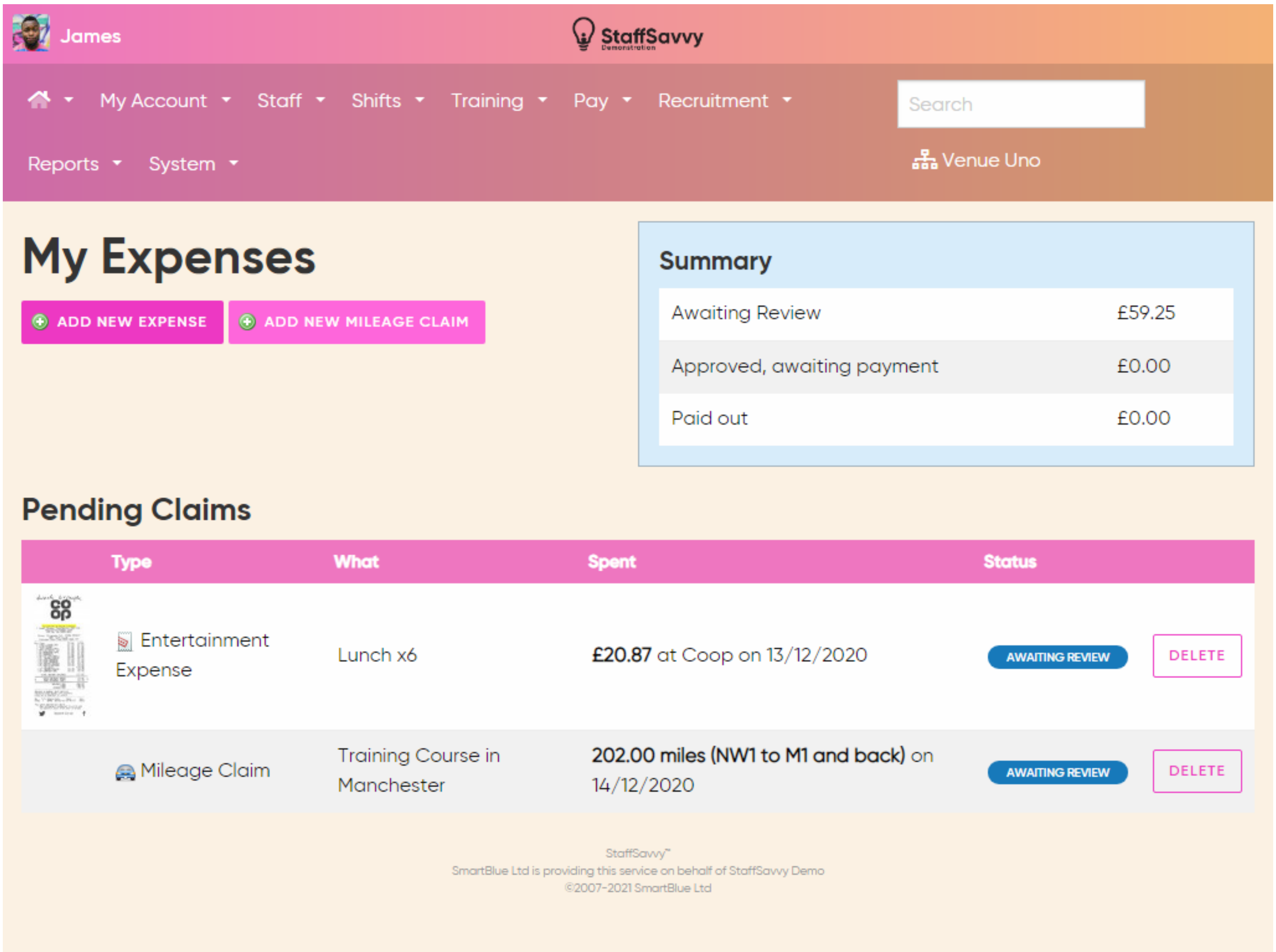
That's all there is to it - this will now add the My Expenses link to the menu for those staff in the role and they can start to put claims into the system.

# 9.3. Making a claim

Staff can make a claim directly from their account. They simply use the My Account > My Expenses page.

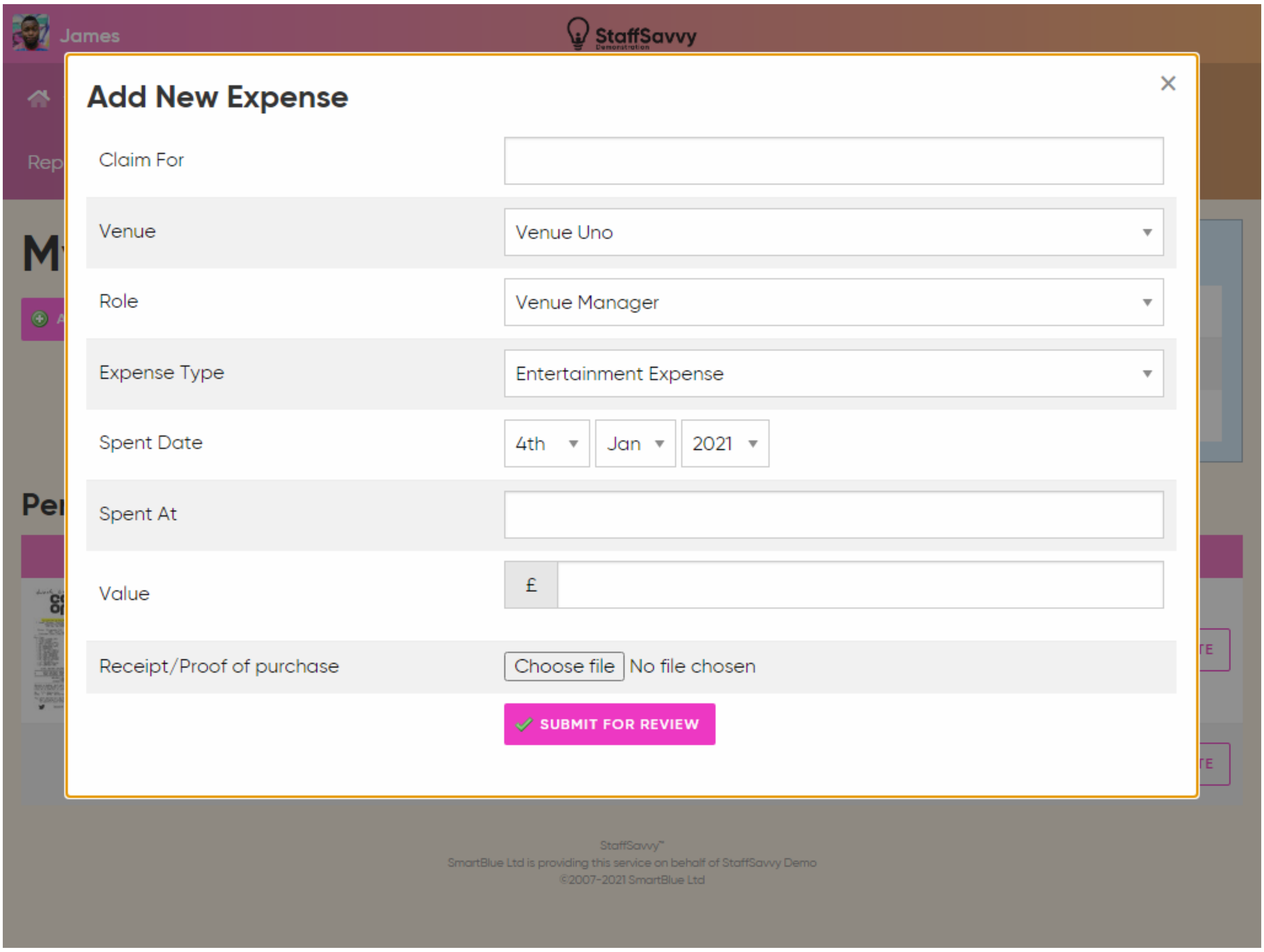
This will show them all of their pending claims as well as allow them to make a new claim.




# 9.4. Expense Claim

If an expense pay element is assigned to one of their roles then the staff member will see an Add New Expense button on their My Expenses page.

This will display a form to complete:

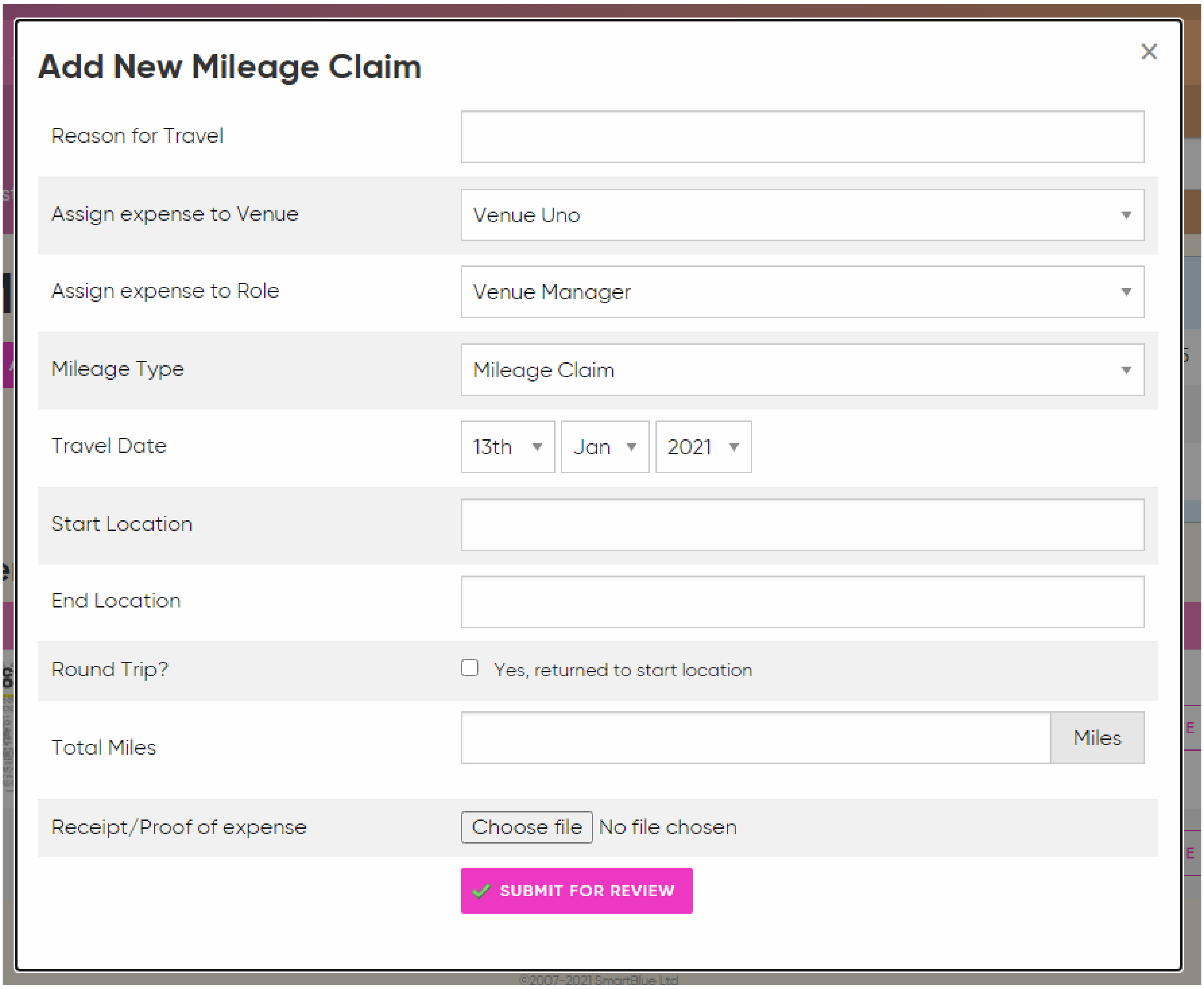



They must provide the required information including an image/PDF of their receipt or proof of purchase. The role and venue allow the expenses to be reported by this information too.

### 9.4.1. Mileage Claim

If a mileage expense pay element is assigned to one of their roles then the staff member will see an Add New Mileage Claim button on their My Expenses page.

This will display a form to complete:




They must provide the required information including the start & finish locations and to confirm if it was a round trip or just a single direction.

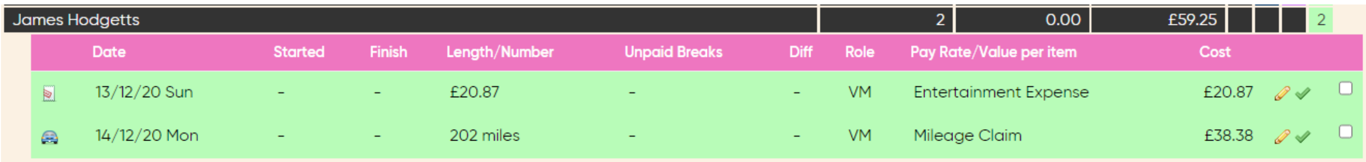
They will also be asked to enter their total miles which allows them to include diversions etc.

We'll also ask for a receipt or proof of payment but this is not currently a required element.

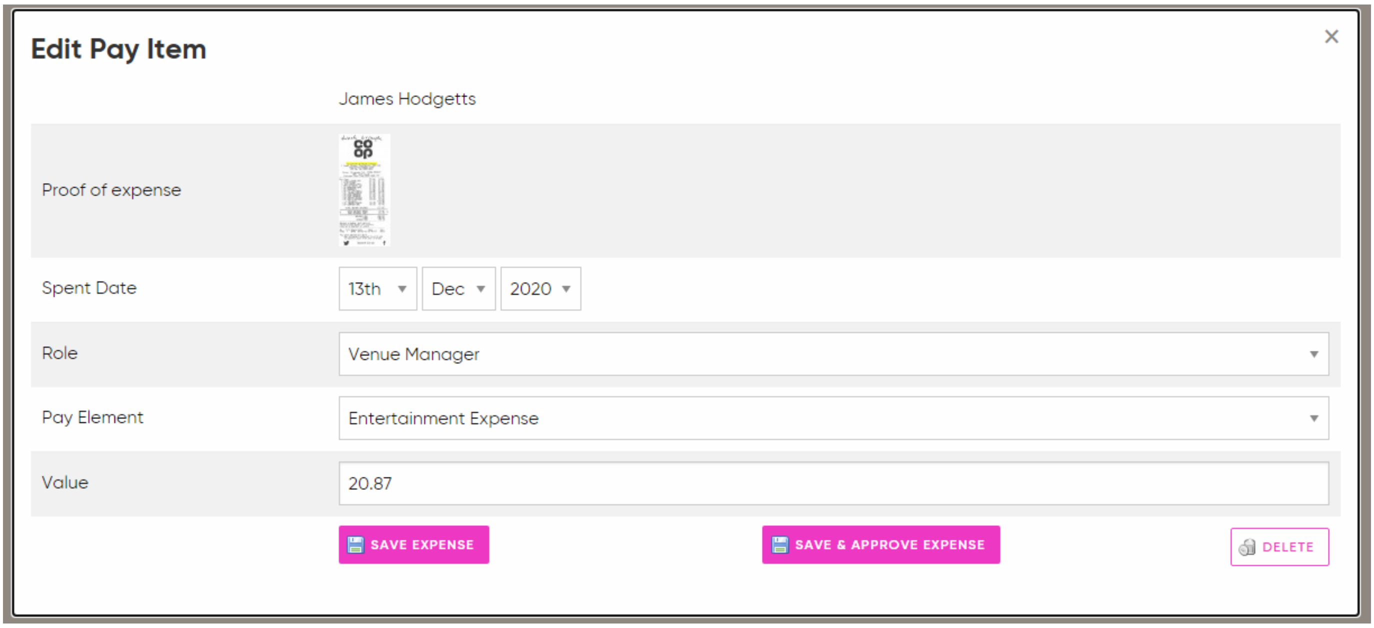
# 9.5. Approving Claims

All claims will be displayed within the Unprocessed Pay report; this shows all time entries, pay items and expense claims in a single report to be reviewed.

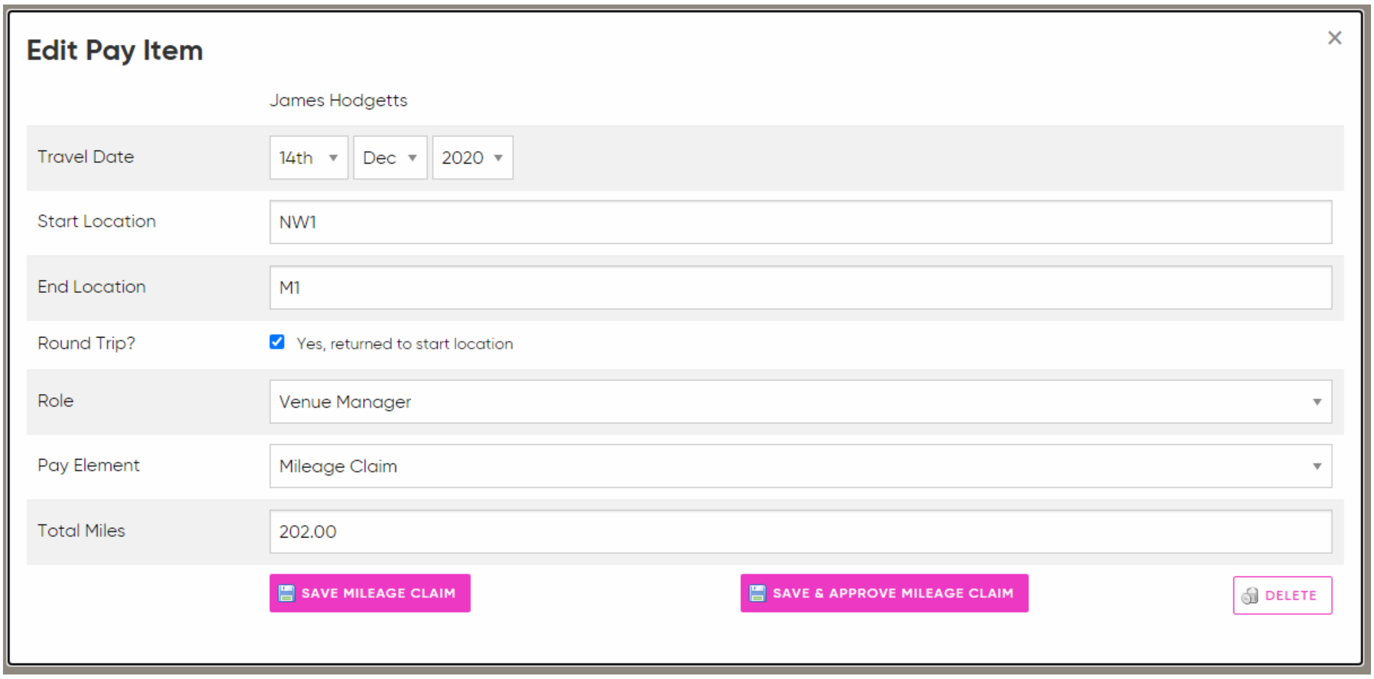



The icons on the left show the type of claim being made and the Length/Number column shows the value or miles claimed.

Clicking on the edit icon will display further details:






Claims can be adjusted, approved and deleted.

Staff will be notified when a claim is deleted; a record will be stored in the system of the claim and removed claims can be seen using the “show deleted items” filter on the unprocessed report.

## 9.6. Exporting & Reporting

As the claims are processed through as a pay element, they’ll automatically go through to your wage sheets and payroll exports.

No additional work should be needed to ensure this works as expected. Simply use the same wage sheet creation and export process as normal.

If your payroll system is a direct connection, we’ll automatically pass the approved details over as the wage sheet is processed.

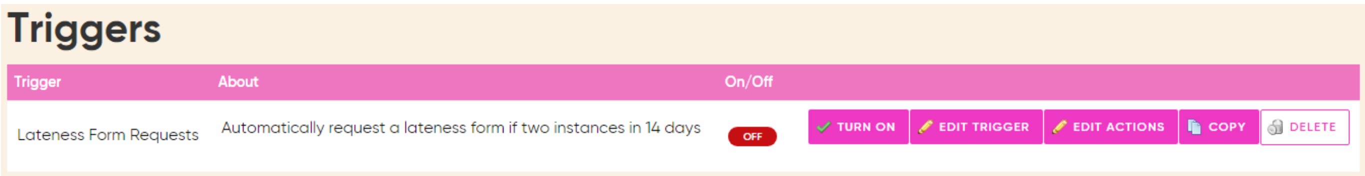
 

# 10. Triggers (Workflows)

## 10.1. Summary

*Glossary:*
**Trigger**: a set of actions that are performed automatically by StaffSavvy when something happens.
**Event**: one of the things that happens that can 'fire' a trigger. E.g. An event might be a staff member completing a training stage.
**Action**: something the system needs to do when the event happens. E.g. sending an email

Triggers are extremely flexible ways to automate your workflow including basic changes to staff accounts.




The image above shows the Triggers list; this is where all of your triggers will be shown. This is found under System > Manage Triggers.

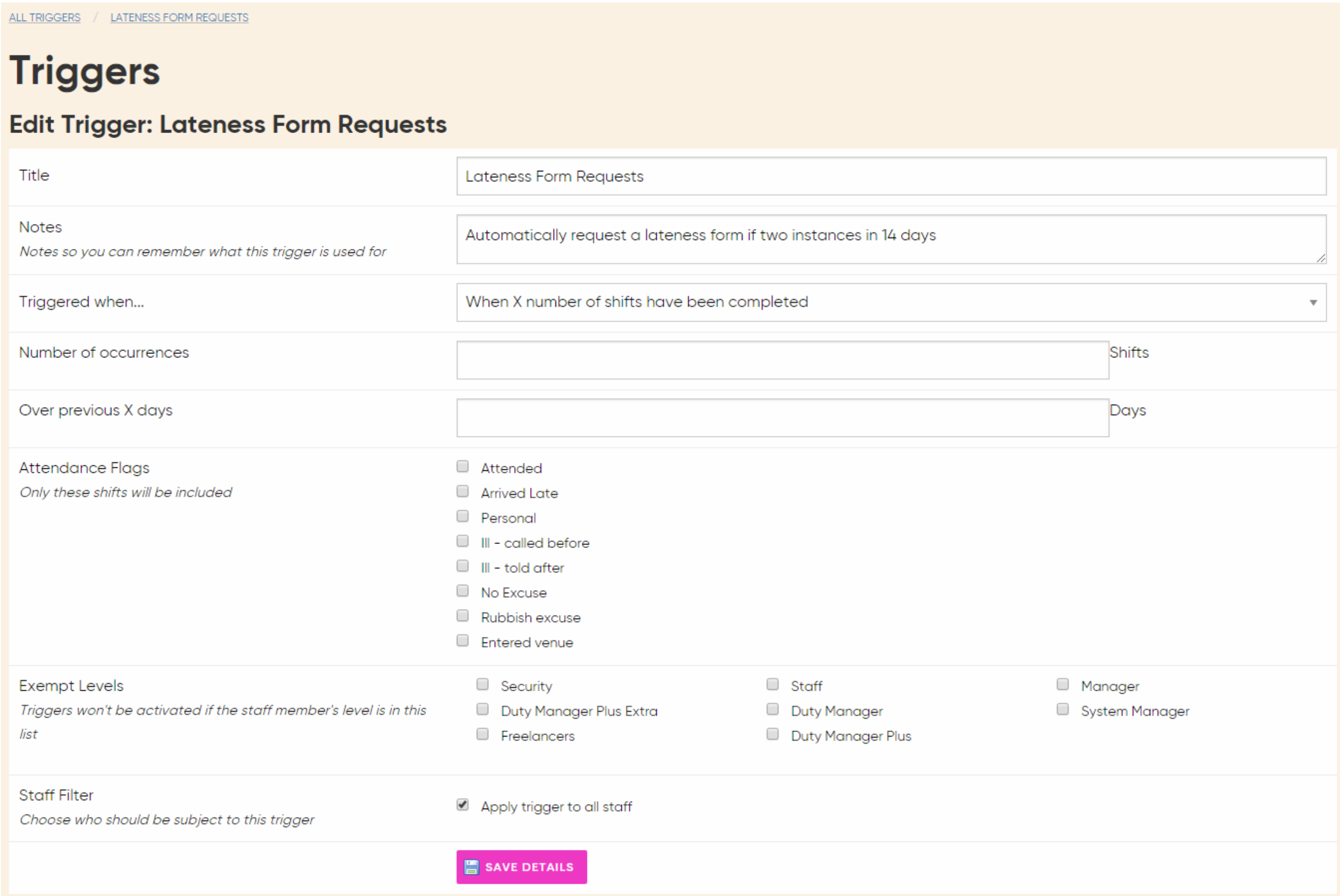
You can add a trigger under the Actions menu.

Once you have a trigger, you will see a list as per the image above that gives you access to Edit triggers, edit actions and copy the trigger.

Each trigger can be either On or Off. You can set up triggers as needed and turn them on as needed by using the option shown next to its current status.

## 10.2. Trigger Setup


ALL TRIGGERS / LATENESS FORM REQUESTS

# Triggers

### Edit Trigger: Lateness Form Requests

| | |
|---|---|
| Title | Lateness Form Requests |
| Notes<br>*Notes so you can remember what this trigger is used for* | Automatically request a lateness form if two instances in 14 days |
| Triggered when... | When X number of shifts have been completed |
| Number of occurrences | Shifts |
| Over previous X days | Days |
| Attendance Flags<br>*Only these shifts will be included* | Attended<br>Arrived Late<br>Personal<br>Ill - called before<br>Ill - told after<br>No Excuse<br>Rubbish excuse<br>Entered venue |
| Exempt Levels<br>*Triggers won't be activated if the staff member's level is in this list* | Security<br>Duty Manager Plus Extra<br>Freelancers<br>Staff<br>Duty Manager<br>Duty Manager Plus<br>Manager<br>System Manager |
| Staff Filter<br>*Choose who should be subject to this trigger* | Apply trigger to all staff |
| | SAVE DETAILS |

The Trigger has a title and notes field which helps you keep track of what each of the triggers are being used for. In the example above, the trigger is to automatically change a staff member's roles when they have completed enough shifts successfully.

The "Triggered when..." drop down chooses the 'event' that will start the trigger running. Depending on the type of event, you will also be shown some additional options. In the example above, the event allows you to set the number of occurrences over a number of days. So it might be 3 successful shifts over 14 days or 10 shifts within 90 days.

The attendance flags allow you to choose which type of shifts you want to include; attended shifts, lateness or the non-attendance flags.

On all events, you have the option to exclude levels so that staff on those access levels will not trigger this event.

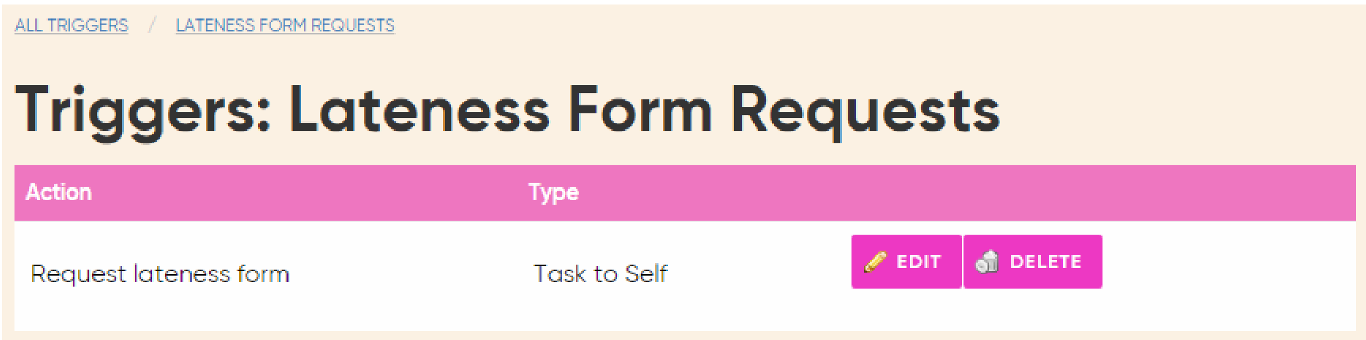
 

## 10.3. Trigger Actions

The actions are what the system should do when the trigger is run.

You can have as many actions as you wish on a trigger. Actions range from adding/removing roles and venues from an employees' account through to sending emails and creating tasks.

Once you have created your trigger, click Edit Actions to view and add your Actions.




When adding an action, you'll see a similar form to when you completed adding a Trigger. You will be asked what type of action you want to add and then will be shown options based around that type of action you are adding.

Complete all of the options for the action and click save. If the trigger is enabled then the changes will be made instantly and any new events will use the new settings.

All executed actions on a trigger are recorded and will be available for audit purposes in a future update.

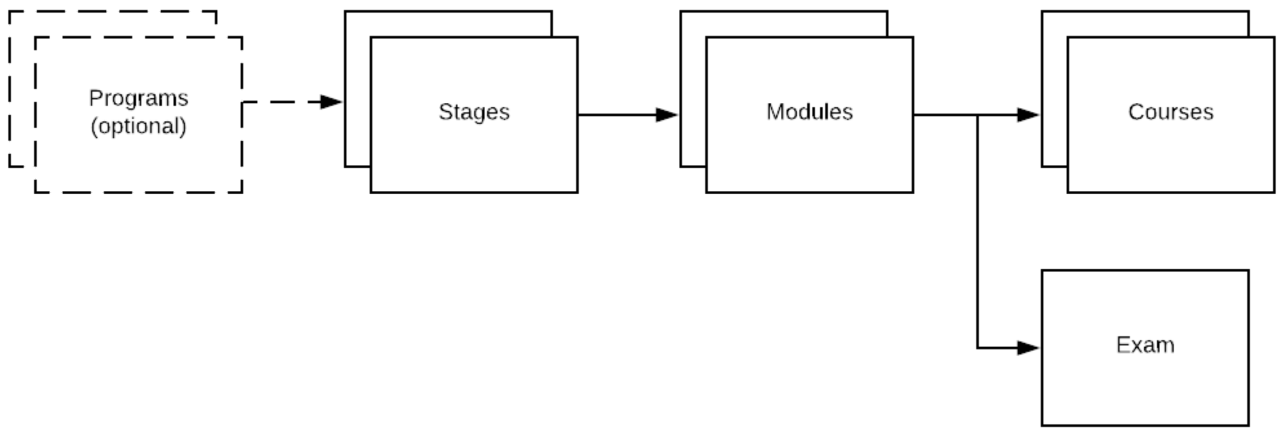
# 11. Training

StaffSavvy's training section allows for the management of your training program for staff. StaffSavvy's training tools are a complete blank canvas for you to upload your existing program or to create a new one from scratch.

You can also use the training tools to simply track the progress of staff in an external training tool.

## 11.1. Concept

The training tools are made up of four key parts. There is also an optional fifth part; programs. These join stages together into one item.




- **Programs**
  Can be called workbooks, paths or packages. A program is a collection of Stages that need to be completed. Once complete, the program issues a certificate. Programs can expire if any of the stages within them expire or they can remain valid.
  A stage can be assigned to multiple programs and a staff member would only need to complete a stage once if required by multiple programs.
- **Stages**
  Often called certificates, workbooks or levels. These are the top level of a collection of training courses and exams. They can expire and can hold copies of training certificates for staff records. You control who has access to which stages.
  *Examples: Basic Training, Food Hygiene Level 1, SIA*
- **Modules**
  These are parts of a stage. They can be compulsory or optional and you can set how many optional modules must be passed to complete the stage. A module can be online or physical and can have an

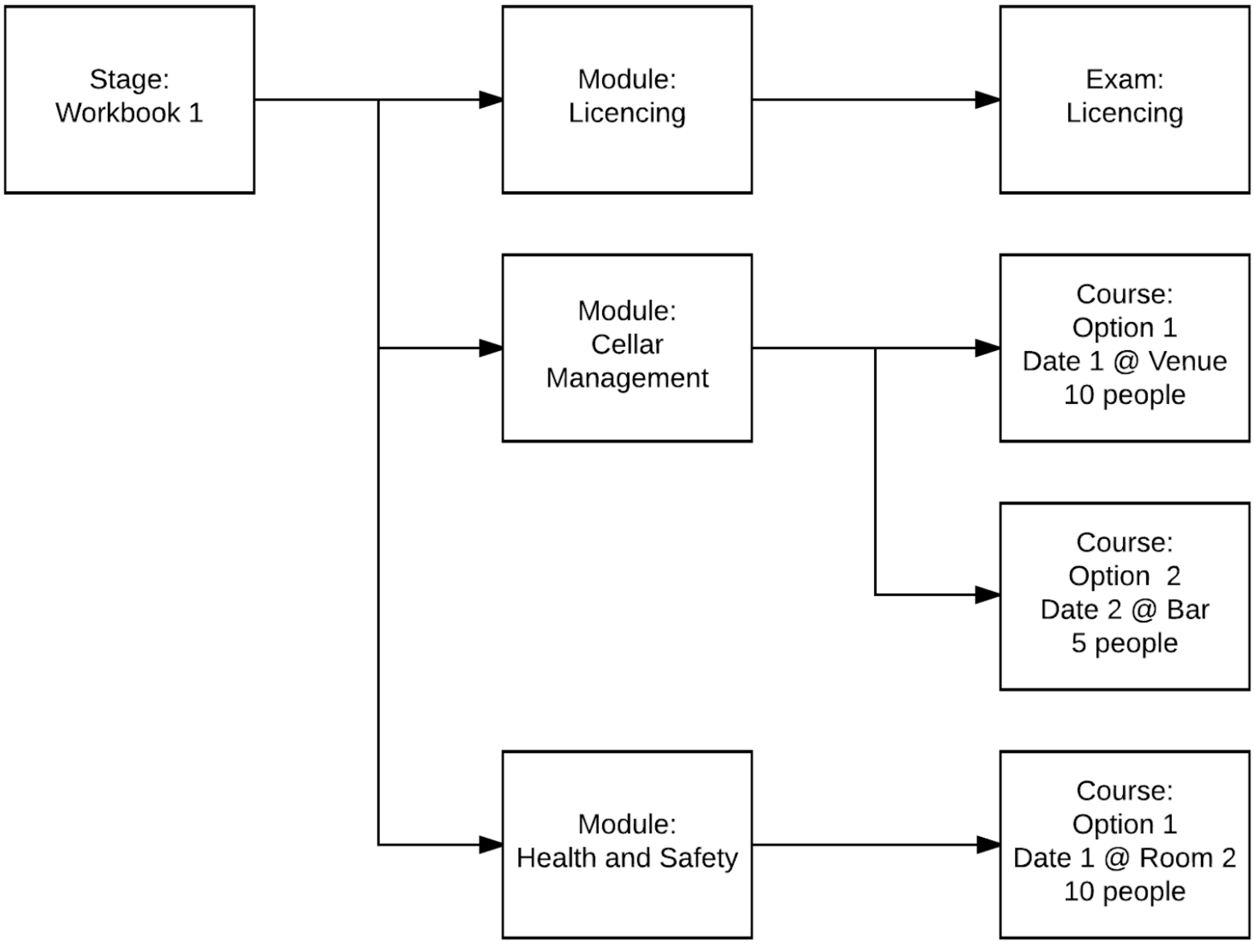
 

online exam attached.
Stages must have at least one module but can have as many as you need.
*Examples: Licensing, Cellar Management*

- **Courses**
  These are used on physical modules only; they are set dates and times that a staff member needs to attend a physical training session. They are run by another staff member and they report who passes and fails the course and therefore, the module. Multiple courses can be set up on each module and a course can be a single date and time, or can be a "string" (e.g. the Cellar course is every Tuesday at 3pm for three weeks).
  Staff sign up for the course that suits them and their availability.
  *Examples: Food Hygiene (external examiners), Cellar Course, Safe Lifting*

  Physical Modules can have as many courses as needed. If there are no courses coming up then this will be flagged within the management view.
- **Exams**
  These are online tests that must be passed to complete a module. They are multiple choice or essay answers and can have complex marking rules to ensure staff have the correct knowledge. You can also allow staff to retake them without manager involvement.
  Online Modules can only have one exam assigned but you can add as many online modules as needed for different exams.
  *Example training plan with physical and online modules:*




There are also a few other elements to be aware of:

- **Training Locations**
  These are physical locations where your courses take place. You can provide information to staff on where to go, where to park etc. A course must have a location set.
- **Feedback Forms**
  You can request feedback on physical courses once they have been completed. The feedback forms can be anonymous or not and can contain any number of questions and answers. Results are summarised for you and you can also see results per course date.

## 11.2. Programs

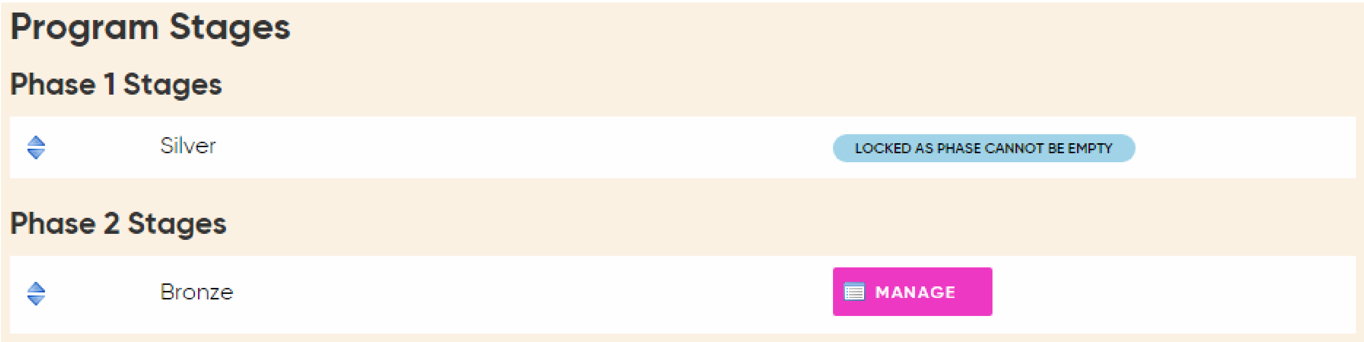
Training programs are optional within the training feature. Programs allow you to group training staged together as a group however training stages can also be assigned on their own.

The benefit of a training program is that it will grant access to all of the stages to the staff member's assigned to the program and you can award a physical certificate once they have completed all of the stages.

That certificate can be valid forever, expires if any of the parts of the training program expire or expires after a fixed amount of time. This can be managed under Training > Manage Training Plan > Manage Program > Edit.

You can add training programs as on-obarding steps or within the requirements for a role.

The stages within a training program can be added into different phases however the staff member can complete any of the stages at any time to complete the program. This is configured under Training > Manage Training Plan > Manage Programme > Manage Certificates.




## 11.3. Stages

These are the core level of a collection of training courses and exams. You can assign exactly who has access to which stage. Once assigned to a stage, staff members have access to all of the modules and courses within it.

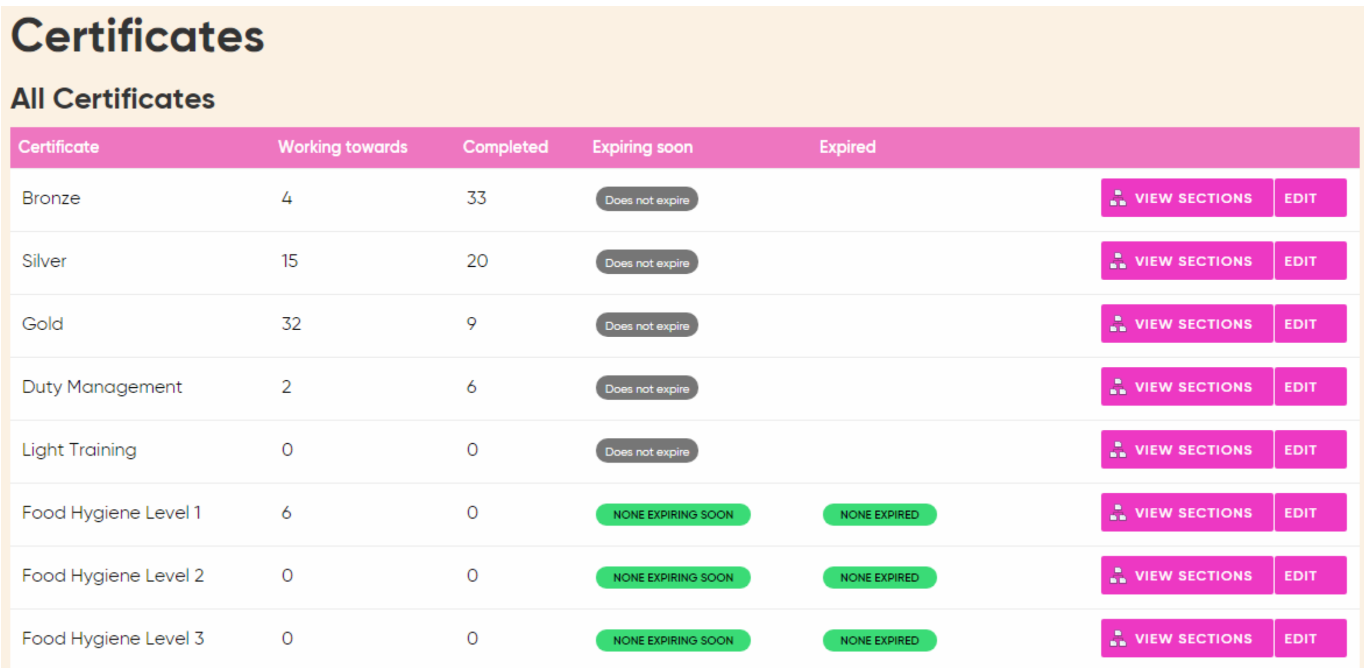
Stages can be self managing; they will automatically pass the staff member once the required modules are completed. They can then grant access to another stage so the staff member can continue their training program. This can be navigated from Dashboard > Training > Manage Training Plan > Manage Certificate > Edit.

Settings & options:

- **Certificate Title**
  Provide a title for the Certificate that is clear and concise.
- **Certificate Information**
  This is where the main body of information about what is included in the Certificate is included.
- **Expiry**
  When set, the stage will automatically expire any completed stage after it has passed. The site will provide warnings to the employee directly and to managers via the Expiring Training report.
- **Managed By StaffSavvy**
  This allows you to record training programs that are managed externally within StaffSavvy.

When enabled, this removes all modules and will simply direct the staff member to the program details page. You can provide an external training URL for them to visit too.

- **Automatic Pass**
  When enabled, the stage will automatically mark a staff member complete when they have passed all required modules and the stated number of optional modules. Without this set, managers must manually confirm the stage is complete (and optionally, upload a copy of their certificate).
- **Optional Module Requirements**
  This sets how many of the optional modules must be completed in order to pass the stage.
- **Next Stage**
  When selected, the system will automatically grant a staff member access to the next stage when this one is marked as complete. In combination with exams and automatic passing of stages, this allows for a completely self-managed training program.
- **Printable Certificate**
  This allows you to either create a certificate or upload a copy of a physically issued one.
  Note: The create a certificate option is undergoing refurbishment and will be updated in a future version. The current version may have issues on certain browsers.
- **Staff Member Certificate Upload**
  When enabled, the staff member can upload their certificate to prove they have completed the training. This will automatically be displayed on manager's dashboards if they have permission to approve documents in general.
  Managers can then approve or reject the certificate and enter the date the staff member passed the training program.
  These certificates are then also stored on StaffSavvy and are available under their profile page.



# Certificates

## All Certificates

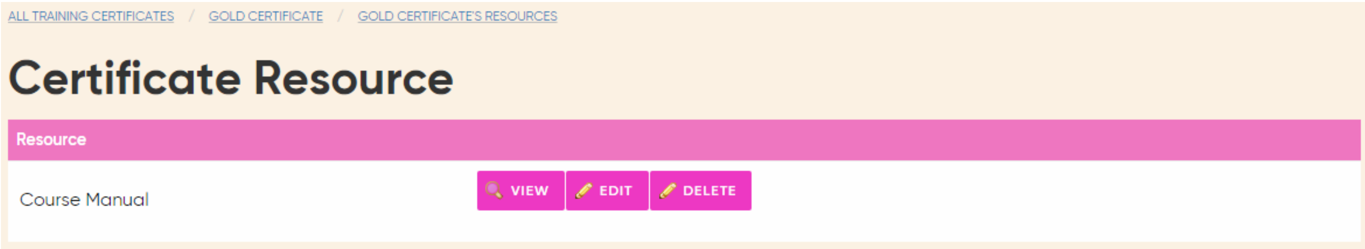
| Certificate | Working towards | Completed | Expiring soon | Expired | |
|---|---|---|---|---|---|
| Bronze | 4 | 33 | Does not expire | | VIEW SECTIONS EDIT |
| Silver | 15 | 20 | Does not expire | | VIEW SECTIONS EDIT |
| Gold | 32 | 9 | Does not expire | | VIEW SECTIONS EDIT |
| Duty Management | 2 | 6 | Does not expire | | VIEW SECTIONS EDIT |
| Light Training | 0 | 0 | Does not expire | | VIEW SECTIONS EDIT |
| Food Hygiene Level 1 | 6 | 0 | NONE EXPIRING SOON | NONE EXPIRED | VIEW SECTIONS EDIT |
| Food Hygiene Level 2 | 0 | 0 | NONE EXPIRING SOON | NONE EXPIRED | VIEW SECTIONS EDIT |
| Food Hygiene Level 3 | 0 | 0 | NONE EXPIRING SOON | NONE EXPIRED | VIEW SECTIONS EDIT |

### 11.3.1. Resources

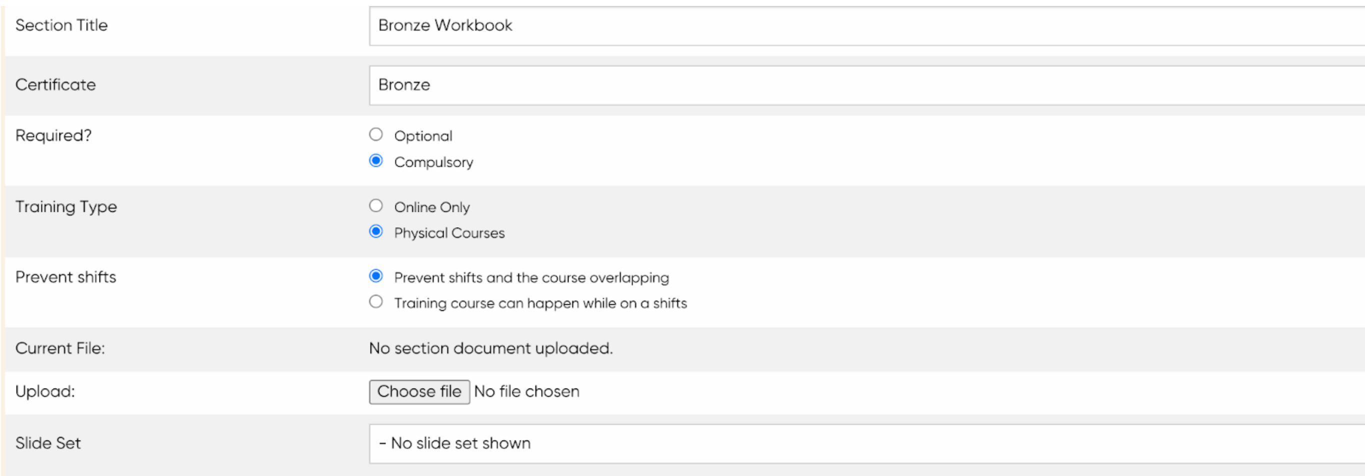
These are documents that are relevant to the stage. They can be marked as required or optional reading. Required reading documents are shown to course leaders along with which of the course attendees has opened/downloaded them.

This is a good location to upload training workbooks for online exams.




## 11.4. Modules

Modules are sections that make up a stage. Each stage must have at least one module.
Modules can be optional or compulsory within the stage.




### 11.4.1. Online or Physical

Online modules are simply a location to store information and an online exam. You can also link to a third party training tool for the teaching (and/or examination).

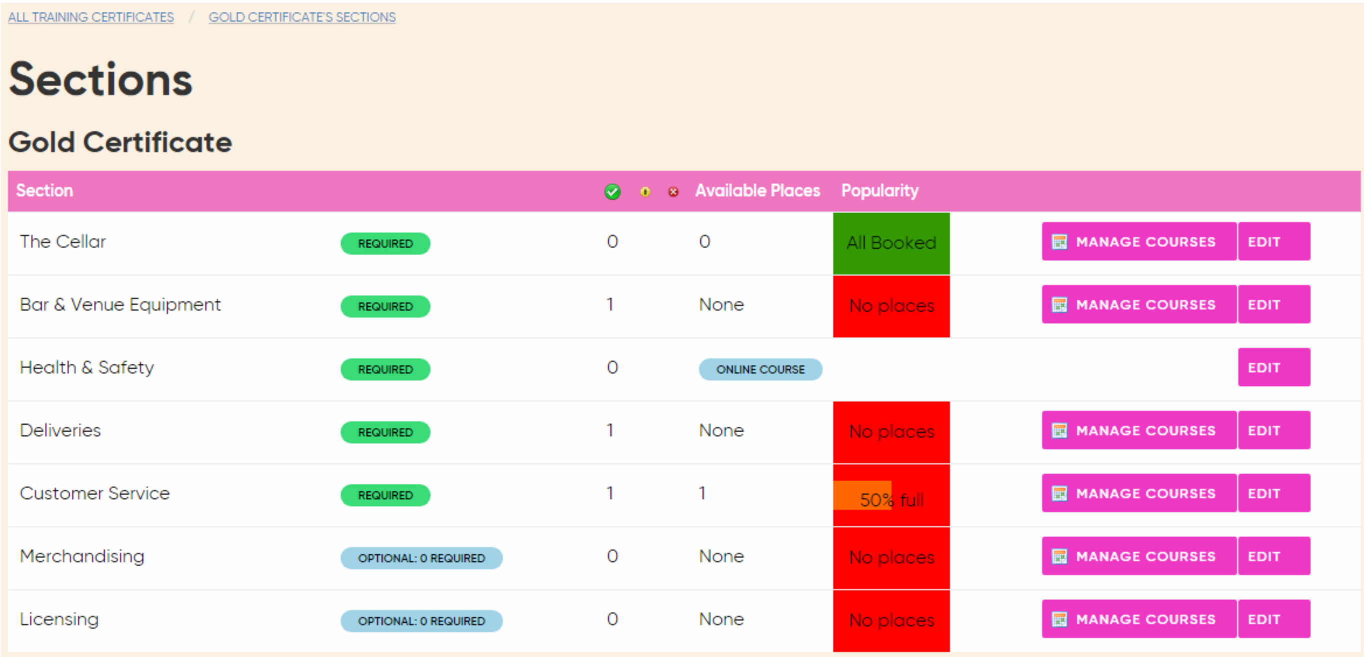
Physical Modules can have courses attached. Each course is a physical date and time for training to be given in person. Several modules can be combined so there is a physical training course and then an online module which includes the exam.

### 11.4.2. Available Places

For physical modules, the modules page will display information on how many places you have available on upcoming courses for that module. It will also show you a popularity gauge that shows how full the courses for each module are.

The popularity gauge will be red when there are no places available either because there are no courses or because all courses are full.




### 11.4.3. Module Options

Modules have the following options:

- **Title**
  This is what the module will be called and shown to all staff.
- **Stage**
  This is which stage the module belongs to. This allows you to move modules between stages easily.
- **Required**
  A module can be compulsory or optional within a stage. If optional, you can set how many optional modules need to be completed within a stage for the stage to be complete. As you'd expect, all compulsory modules must be completed.
- **Training Type**
  - **Online only**
    This means no course dates will be added. The site will simply present the module information to the staff member and then they will be directed to take the associated Exam. If no exam is

assigned then the module will await a manager's decision on the module. This can be provided via the staff member's training status report on their profile.
    - **Physical Courses**
    This allows you to add course dates to the module for staff to sign up to. You can still assign an online exam if required. Either passing the exam or being marked as passed by the course leader will pass the module. If you wish them to both attend the course and pass an exam then we recommend adding the exam as a separate module to the course module.
- **Prevent Shifts**
Choose if this module can be conducted while already scheduled on a shift or if they cannot overlap with any scheduled work time.
- **Current File / Upload**
This allows you to upload the course material to the module. It will be shown to the staff above the instruction to take the exam so you can inform them to read the document within the module information.
- **Slide Set**
This allows you to set if you want to include relevant training documents for staff to work through before taking an exam.
- **Online Exam**
Sets if the exam will contain an online exam or not and which exam should be taken. Exams are set up independently from training modules as they can be used in several ways.
- **Section Information**
This is displayed for all staff to read before booking a course or taking an exam. This section can contain any information you want to share.
- **Section Requirements**
This can be used to state any prerequisites that are needed before this course. You might also include anything that will be expected of the staff members to pass the course. This section can contain any information you want to share.

## 11.5. Courses

A course is a physical training session with a start time, end time and location. Courses are created as part of a physical module and can be a single date or a “string” of dates that make up a full course. Navigate to create a course via Training > Manage Training Plan > Create Course.

Options on a course:
- **For Section**
Specify the Section this course will come under.
- **Start**
The start date and time for this course.
- **End**
The expected end time for this course.

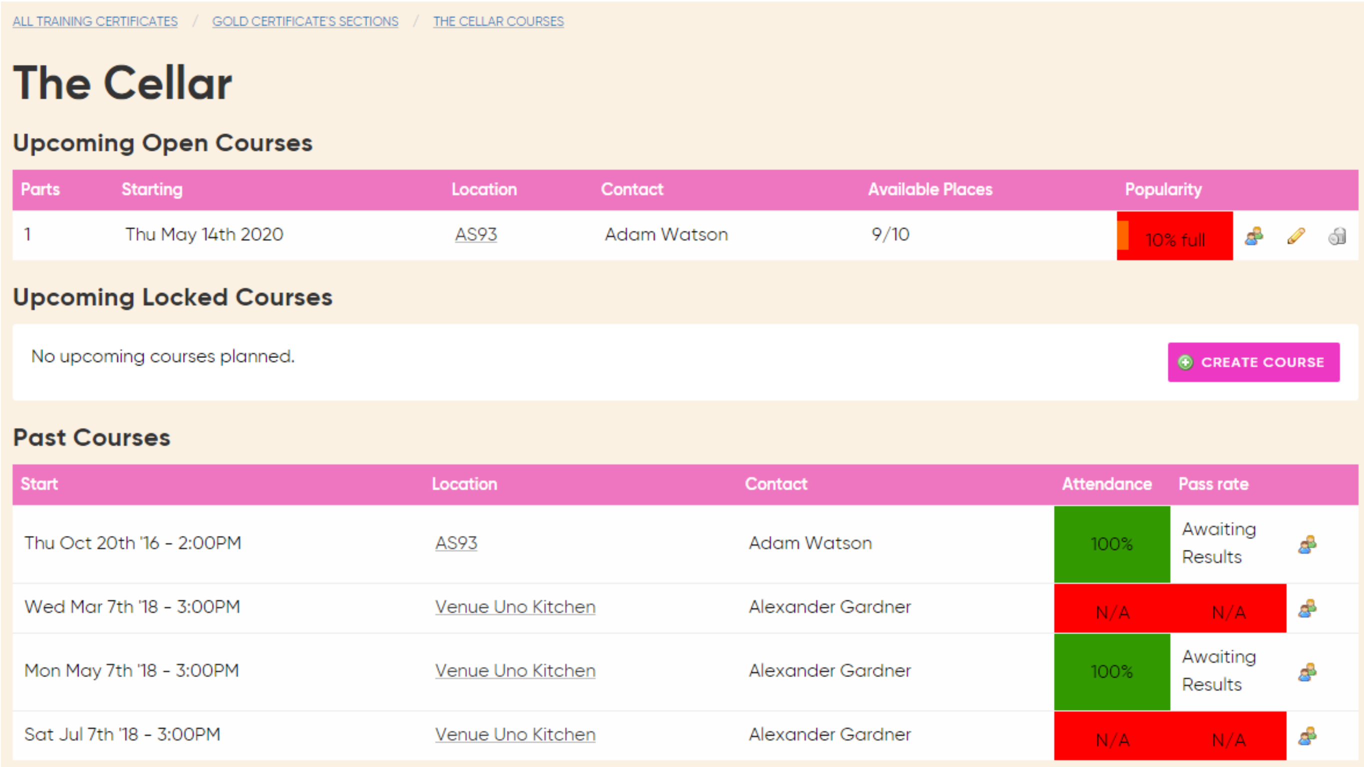
- **Part of a string?**
  This setting allows a course to be multi-part. E.g. a course has several actual dates that all need to be attended. When signing up to a course in a string, the staff member is signed up to all parts as one session.
- **Location**
  The location of the course. The location provides information to the staff on where the course is taking place and how to get there. See training locations.
- **Allow Accommodation requests**
  This option allows staff to request overnight accommodation before or after the training session. This will be shown on a report to allow the accommodation to be booked.
- **Number of Places**
  This is how many staff can sign up to this course.
- **Training Coordinator**
  This is the person responsible for the training course. They will be asked to report on the attendees and confirm who attended and who passed/failed the course.
- **Course Extra Info**
  This is specific information for this one course. It might be additional details or comments just for this one date.
- **Lock Signup**
  This date is when sign up to the course is locked. After this date no further staff members can join the course and any accommodation requests are locked too. It's designed to allow you enough time to book details, cancel under-filled courses and generally be prepared for the course.
- **Cost**
  This is an optional value that is used to report on training costs per venue over a time period. It can be used for internal billing if training is shared. Accommodation costs are also included.
- **Feedback Form**
  This feature requests feedback after a course takes place. It can contain any number of questions and the results can be named or anonymous. See Feedback Forms.

### 11.5.1. Managing Courses

This page shows you all of the courses for a particular module and shows them in three groups; upcoming, locked and past courses. Navigate to Training > Manage Training Place > Manage Sections > Manage Courses.

You can click on the people icon to see all course attendees.


ALL TRAINING CERTIFICATES / GOLD CERTIFICATE'S SECTIONS / THE CELLAR COURSES

# The Cellar

## Upcoming Open Courses

| Parts | Starting | Location | Contact | Available Places | Popularity |
|---|---|---|---|---|---|
| 1 | Thu May 14th 2020 | AS93 | Adam Watson | 9/10 | 10% full |

## Upcoming Locked Courses

No upcoming courses planned.

CREATE COURSE

## Past Courses

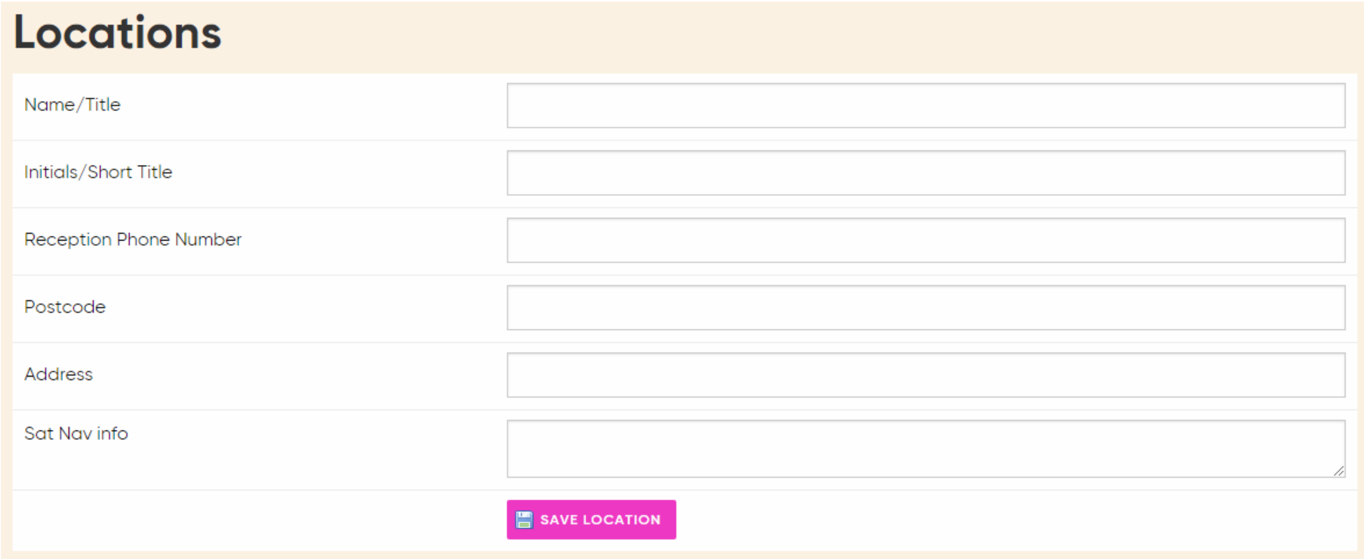
| Start | Location | Contact | Attendance | Pass rate |
|---|---|---|---|---|
| Thu Oct 20th '16 - 2:00PM | AS93 | Adam Watson | 100% | Awaiting Results |
| Wed Mar 7th '18 - 3:00PM | Venue Uno Kitchen | Alexander Gardner | N/A | N/A |
| Mon May 7th '18 - 3:00PM | Venue Uno Kitchen | Alexander Gardner | 100% | Awaiting Results |
| Sat Jul 7th '18 - 3:00PM | Venue Uno Kitchen | Alexander Gardner | N/A | N/A |

# 11.6. Locations

Locations are a simple entry that just informs course attendees where the course is being held. It can contain full addresses and directions to help people find the correct room.

A course must have a location assigned so it is worth setting up common locations before training courses are used so they are ready to use. These can be set at Training > Setting > Course Locations.




## 11.7. Training Slides

Training slides are a simple feature that allows you to present information to a staff member before completing an exam on a training module. Each set of slides are made up of multiple pages of information that can contain any mix of text and images.

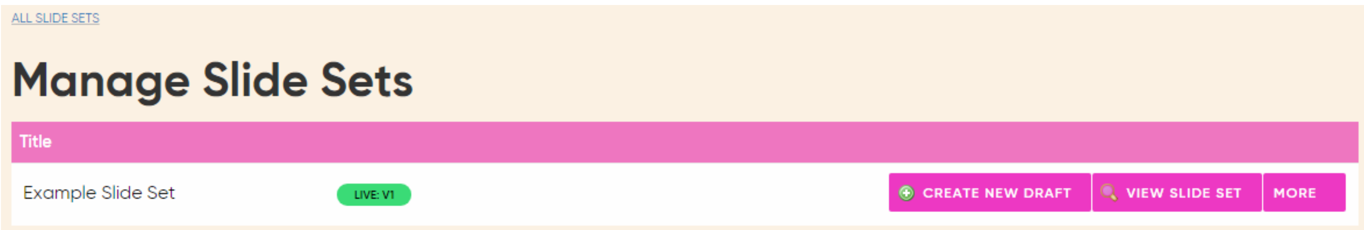
The layout options for the slides are currently limited. This is to ensure we provide the best flexibility to the staff members and ensure the information is clear and readable on all devices and screen sizes.

### 11.7.1. Manage Slide Sets

The main management area is under Training > Manage Slide Sets.

This will load with a list of your current slide sets and their status. Just like exams and recruitment application forms, the slides are version controlled. This allows you to create new drafts and publish them when ready.

You can add a new slide set from the Actions menu.




You must edit slides in a draft so if you want to edit a published slide set, simply Create a New Draft first. This will open it up for editing.

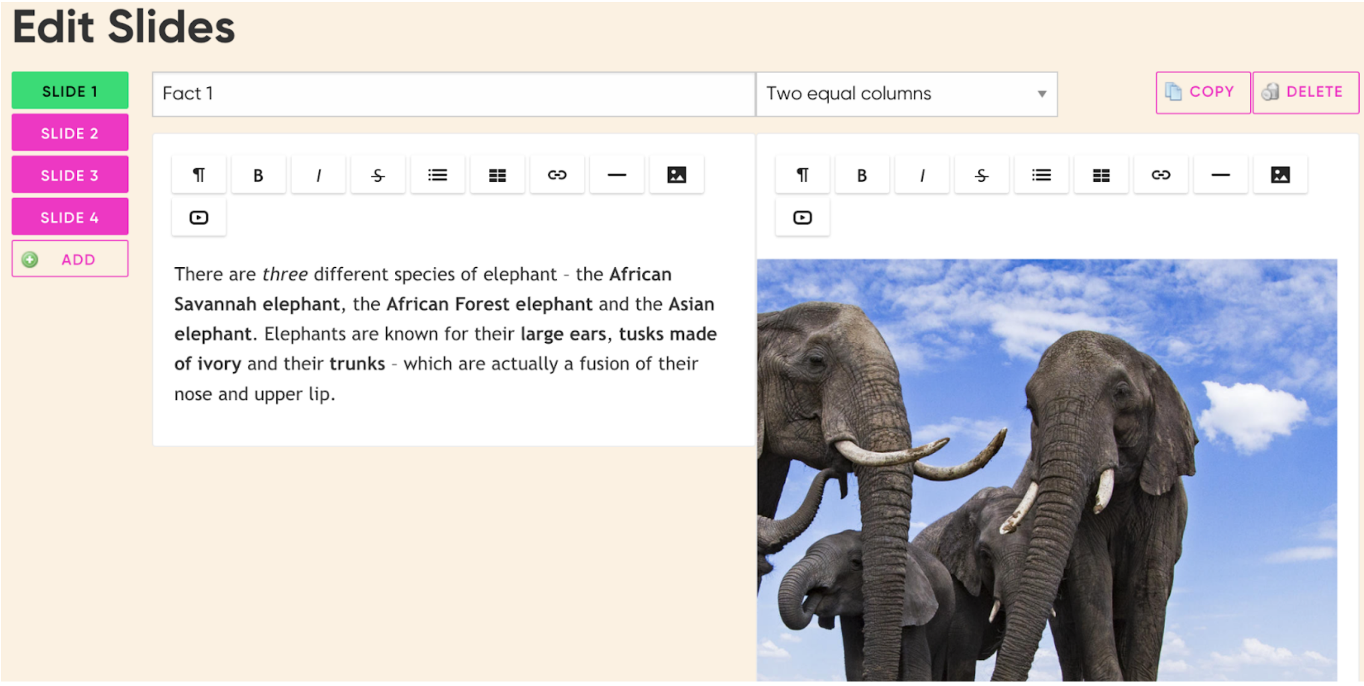
 

You also have access to delete and copy the slide sets from the More drop down.

To help manage the slide sets, you can group them by Categories. Simply use the set category option under the More drop down to assign the category. You can then filter by category using the Category options at the top of the list.

### 11.7.2. Create/Edit Slides

This page is the main control panel for all of your slides within your slide set. You have a list of your slides on the left with the current slide shown on the right.




#### 11.7.2.1. Slide List

To add a slide, press the ‘Add’ button in the slide list. To change the order of the slides, simply click and drag. Note that the titles of the slides will change to reflect its position in the list (e.g. Slide 3 will become Slide 1 when you drag it to the top).

Click on a slide to start editing it and the slide you are currently editing is highlighted in green.

#### 11.7.2.2. Editing a Slide

The right side of the page is dedicated to editing of the selected slide. You have a title for the slide shown at the top along with a layout drop down. In the top right, you also have access to Delete and Copy the slide.

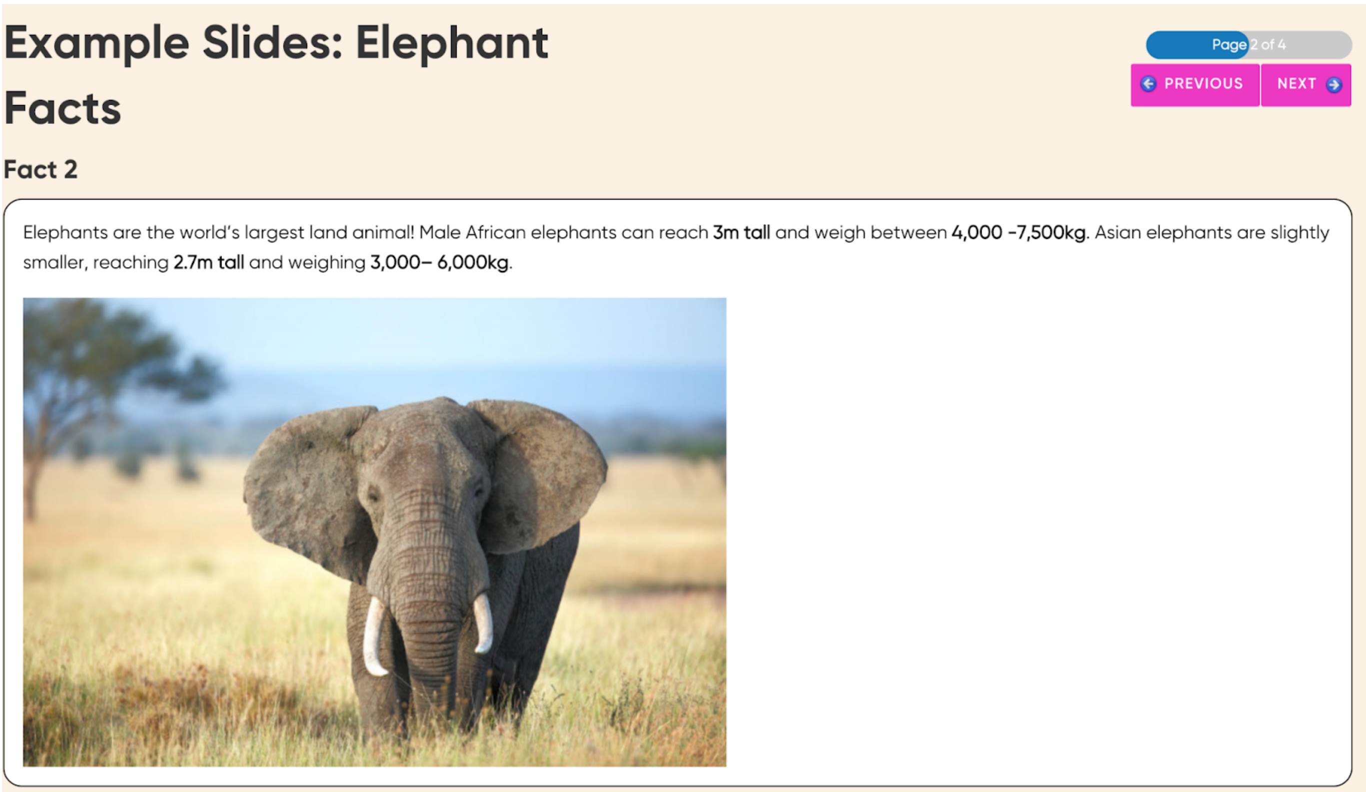
Each slide can have several layouts. Full with or multiple columns of different sizes. This allows you to split your slide's content out and make it easier to follow while still making the pages easily readable on small devices and mobile phones.

Note: on small devices, the multiple columns will be stacked on top of each other. So the left side will be shown first and then the right side. This is the only way to ensure the content is readable by the staff members. Due to this, it's best to avoid saying "in the images on the right" or "on the right side is…" as the images will either be on the right or below depending on the size of screen the staff member is using.

Changing the layout or the content on the slide is instantly saved.

You can add as many images as required to the slides; simply use the image upload button in the toolbar. Once added, you can click on the image to Edit it. This allows you to add titles or to align the image left or right of the page. With this option the image can be shown on the right with text wrapping around the left side (for example).

You can preview the slides at any time from the Actions menu or from the list of slides sets. Don't forget to publish your slides once you are happy with them.



### 11.7.3. Assign to Training Module

Under each training module, you can now assign a slide set. This will automatically be displayed to staff to view when they are looking at the module details.

In addition, if there is an exam attached, the system will direct the staff member through the training slides and then automatically onto the exam for them to complete.

## 11.8. Exams

Exams can be used in several ways within StaffSavvy. They are a completely stand-alone entity so they can be used to pass a training module, required to be passed as part of on-boarding steps or be assigned to a staff member at any time for any other reason. To create and manage exams navigate to Training > Exams > Manage Exams.

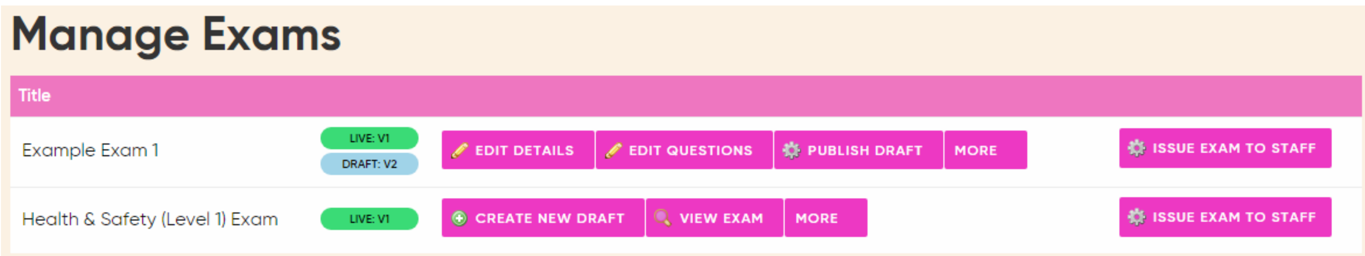
### 11.8.1. Categories

To help organise exams, they can be placed into categories. These are simple text titles that will group all exams with the same text title together. You can add to and create categories by clicking the ‘more’ button next to each exam title.

### 11.8.2. Versions

Exams have a full version control system. This means that you can make changes to an exam before publishing it. Only published exams will be taken by staff members.

Staff will always take the latest version of an exam and records of past exam versions are always maintained. You are able to see the exact answers a staff member gave to each question as they were at the time they took the exam.




To edit an exam, you must edit a draft. If an exam is published then you will only be able to create a new draft.

All of the options and configuration settings on an exam are linked to the version.
Any changes to the title, information or pass mark will be contained in the new version.

### 11.8.3. Exam Options

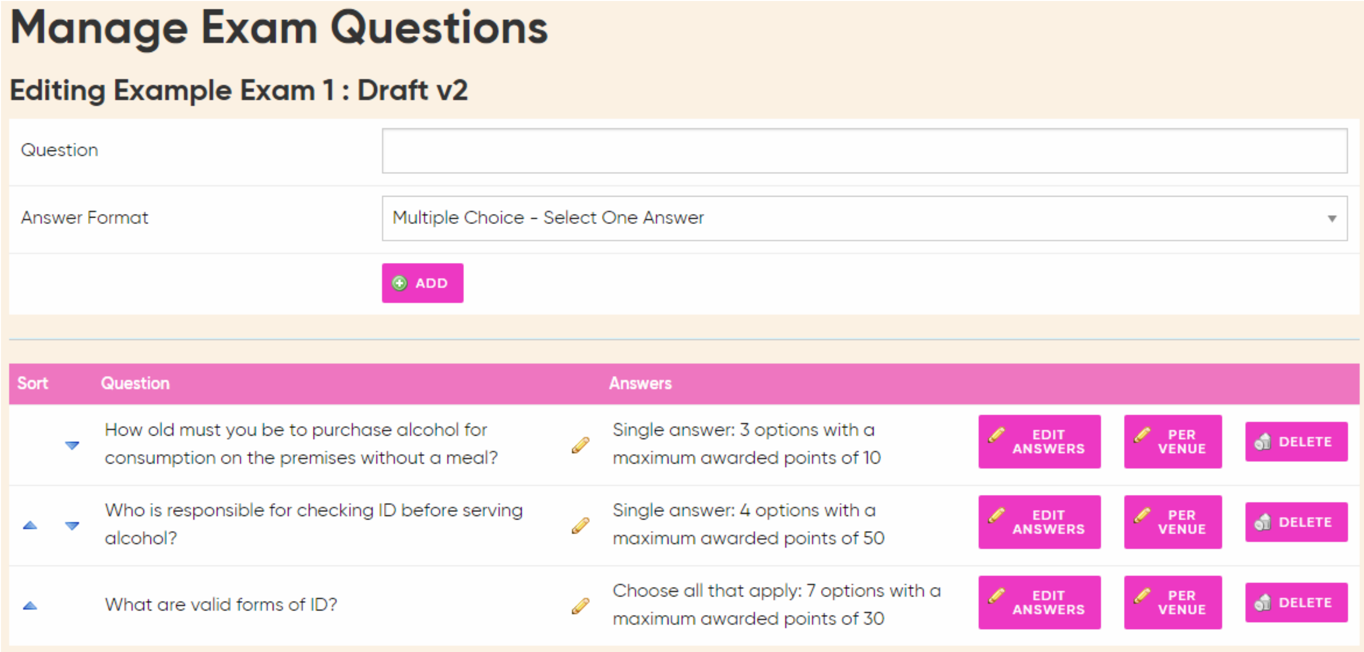
There are the options on an exam:

- **Exam Title**
  The title of the exam as shown to staff and managers.
- **About Exam**
  This is displayed before the staff member starts the exam.
- **Introduction**
  This text is displayed at the start of the exam before the first question.
- **Post Exam**
  This text is displayed once the staff member has completed the exam. Note that they could have passed or failed the exam.
- **Automatically Pass/Fail**
  This can be ‘on’ for multiple choice exams and ‘off’ for exams with text answers that need marking.
- **Who can score the answers**
  Selection for the access levels that can score this exam.
- **Auditing**
  This allows another access level to review the scores provided and make changes before confirming a pass/fail. If ‘on’, you need to select the access levels who can do this.
- **Score or Percentage required to pass**
  There are two options on how to mark the exams. Either it can be a percentage of the total marks available or a fixed score.
- **Allow staff to retake the exam?**
  When set, staff can retake the exam this number of times without manager intervention. Each of the failed exams are stored for review if needed.
- **Retake all questions**
  This option allows staff to only answer the questions they got wrong previously. Staff are shown the question and the correct answer before continuing through the questions.
- **Active**
  Allow the exam to be assigned out to staff.

*This information can be modified by clicking ‘edit details’.

### 11.8.4. Question Management



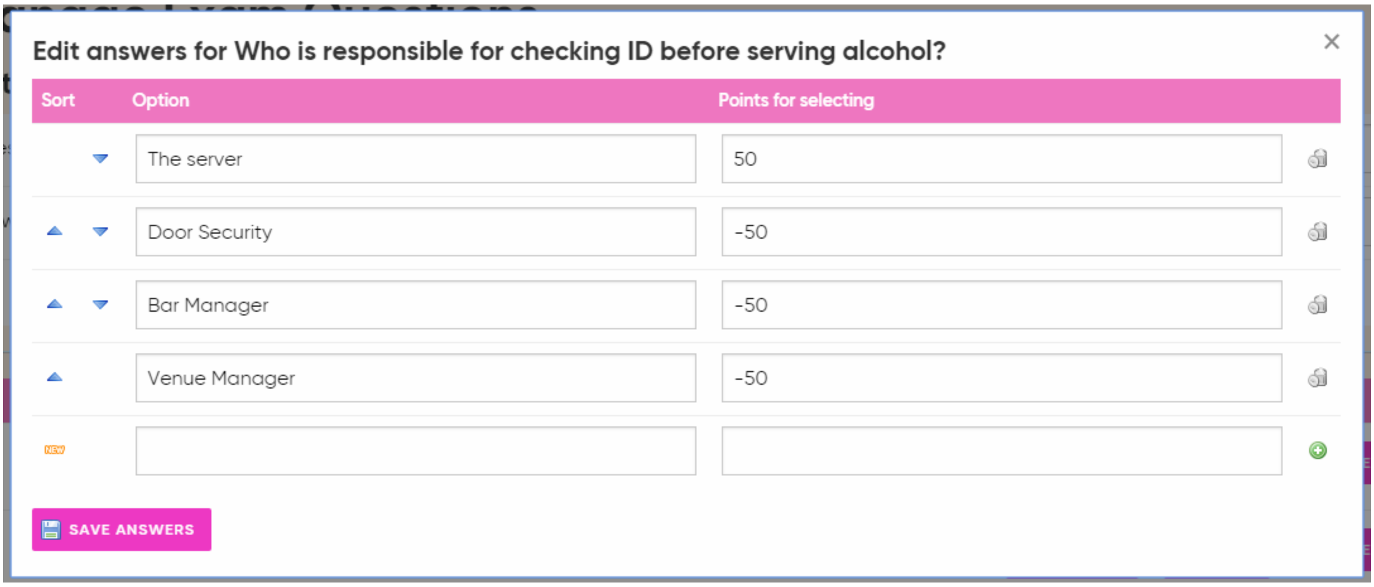

#### 11.8.4.1. Adding a Question

First go to Edit Questions, (next to Edit Details) and then simply enter the text for your question in the question box and choose a format for the answers.

- **Multiple Choice - Select One Answer**
  You provide as many answers as needed and the staff member must select one of them.
  Each answer can contain different points so selecting a mostly right answer can provide some points but the perfect answer can grant more points.
- **Multiple Choice - Choose all that apply**
  You provide as many answers as needed and staff can choose all of the answers that they believe apply.
  Each answer can have different points so incorrect answers can provide zero points (or even negative points). Correct answers can all carry the same number of points or different amounts as needed.
- **Short Test Answer**
  This will allow the staff member to type a short answer to the question.
- **Long text Answer/Essay Answer**
  This will display a longer text area where the staff member can answer the question with basic formatting too.

### 11.8.4.2. Adding & Editing Question Answers




Existing answers will be listed on the page. You can update the answer text and the points by editing them and clicking Save Answers.

To add a single new answer just enter it in the bottom box (with NEW icon to the left hand side) and click Save Answers. You can add multiple new answers by entering the text for the answer and then clicking the green plus icon to the right of the row. This will then add another answer. This can be repeated as needed. When finished, click 'Save Answers' to complete the update.

You can re-order the answers using the blue arrows.

### 11.8.4.3. Marking

#### 11.8.4.3.1. For multiple choice questions

The marking scheme can be as simple or as complex as you need.

The simple method is to simply award 1 point for each correct answer and 0 for all incorrect answers. Then set your pass mark as a percentage on the whole exam.

To give weight to answers, you can give more points to correct answers. You can also mark answers with a negative score. This allows certain questions to be an automatic fail for the whole exam.

#### 11.8.4.3.2. For text answers

You can provide details for the maker on how this question should be marked under the Marking Notes button. This will be available to the marker when they are reviewing the answers.

You also need to set the maximum number of points available.

Once the exam is complete, a notification will appear on the dashboard for the marker. Clicking this will display a list of the exams they can score and audit.

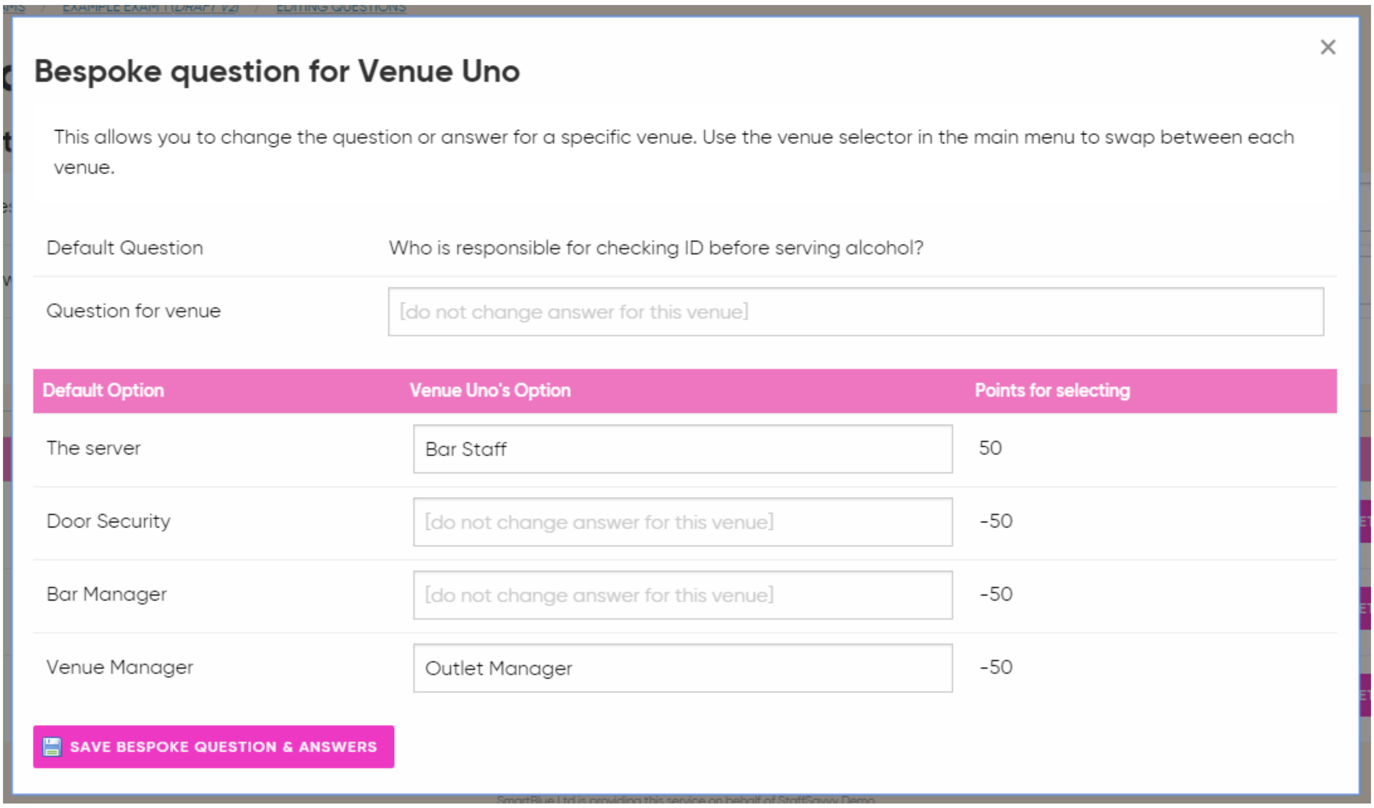
Once a score is provided and confirmed by a marker, the exam might be passed for auditing. Here another staff member will review the answers and scores provided and confirm or adjust the scores.

Both markers and auditors are able to put internal feedback on each question to explain their decisions.

### 11.8.4.4. Answers Per Venue

This feature allows the question and answers to be bespoked for certain venues within your organisation. This allows for relevant answers to be shown to staff while still using the same exam and same marking scheme.

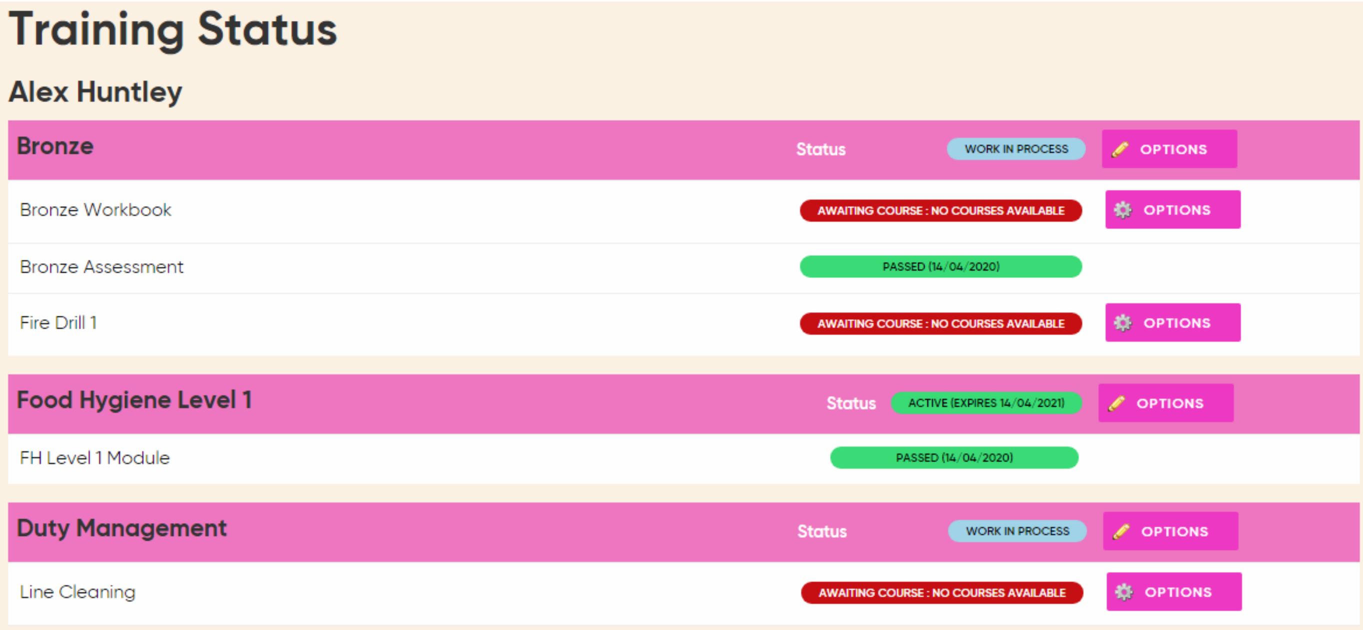
Note; only the text can be edited. The number and scores on each answer cannot be changed and all questions will be asked to all staff.




To change the text, simply enter new text and click Save. To remove the bespoke text for this venue, simply delete everything from the text box and click Save.

Note: the venue switcher in the top right of the screen chooses which venue you are editing the text for. To edit multiple venues simply edit the first, click save. Then change venue using the venue switcher in the top right and edit the answers again.

## 11.9. Staff Member Training Status




This report shows a breakdown of a staff member's training status both by Stage/Program and then for each of the modules contained within.

This gives both the staff member and managers a clear progress report and clear actions on what needs to happen next.

The options button provides direct links to the staff member to book courses, complete exams and see further details. For managers, this also offers a method to override the current status or complete management actions to help the staff member.

The page also gives an easy option to the manager to assign the staff member to new training stages/programs.

### 11.9.1. Training Stage Passed Report

This report shows the last passed date of each employee who has passed a training stage/certificate. You can filter the report by home outlet and then export the details to Excel. Access this report under Training > Staff Member Status > Training Certificate Report.

## Staff Certificate Report

### Duty Management

Home Venue: Any Venue

FILTER

| Staff | Venue | Passed |
|---|---|---|
| Alexander Gardner | Venue Uno | 12/10/2017 |
| James Hodgetts | Venue Uno | 04/07/2017 |
| Lesley Forni | Venue Uno | 08/11/2011 |
| Sam howes | Venue Uno | 22/11/2010 |

EXPORT ALL DATA TO EXCEL

# 11.10. Feedback Forms

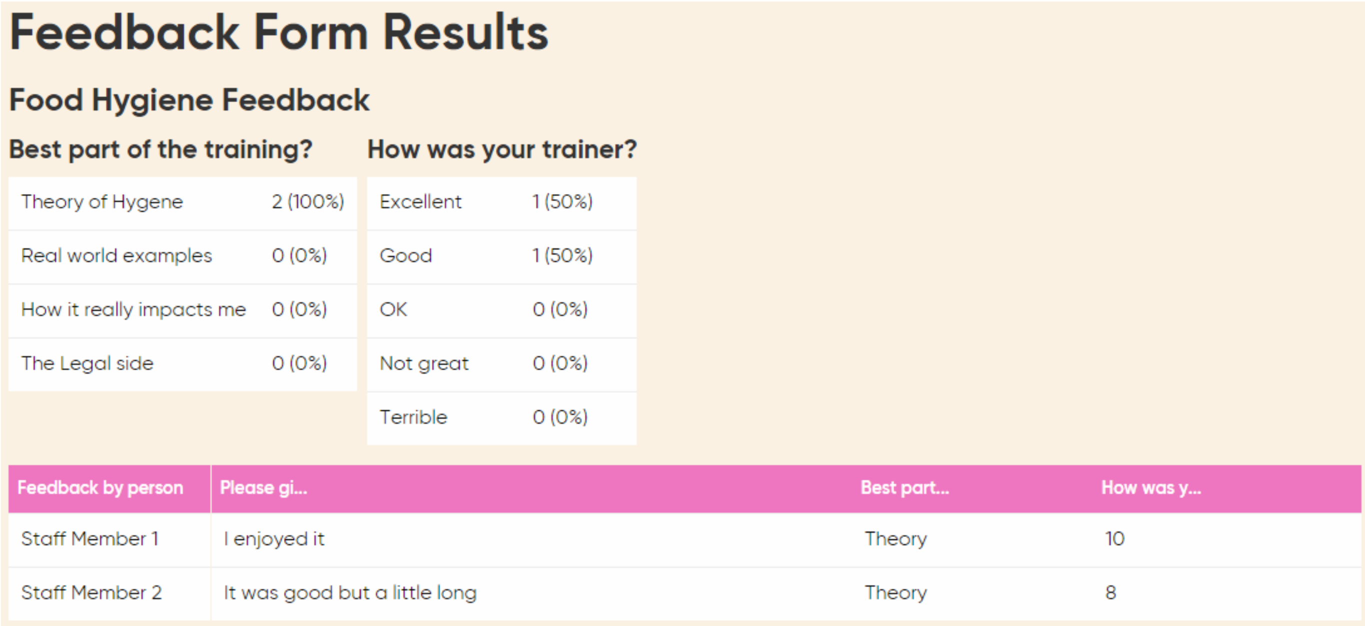
Feedback forms can be used to collect feedback publicly or anonymously from staff who have attended a physical course. Which feedback form should be used is set within the course so each course can have different feedback forms customised for location or the trainer. These can be created by going to the Actions menu under Training > Setting > Control Feedback Forms. Questions can be in any of the following formats; Text; Radio Button; Drop down Selection; Check Box.

The forms can be set to either being anonymous or listed by staff members. Once answers have been received, the anonymous setting cannot be changed as the staff members have been informed that their feedback is private.

Staff will be reminded to complete feedback forms via email and on their dashboard. StaffSavvy will persistently request feedback until it is provided.

Results from each course are provided in a breakdown and summary format:



# Feedback Form Results

## Food Hygiene Feedback

### Best part of the training?

| | |
|---|---|
| Theory of Hygene | 2 (100%) |
| Real world examples | 0 (0%) |
| How it really impacts me | 0 (0%) |
| The Legal side | 0 (0%) |

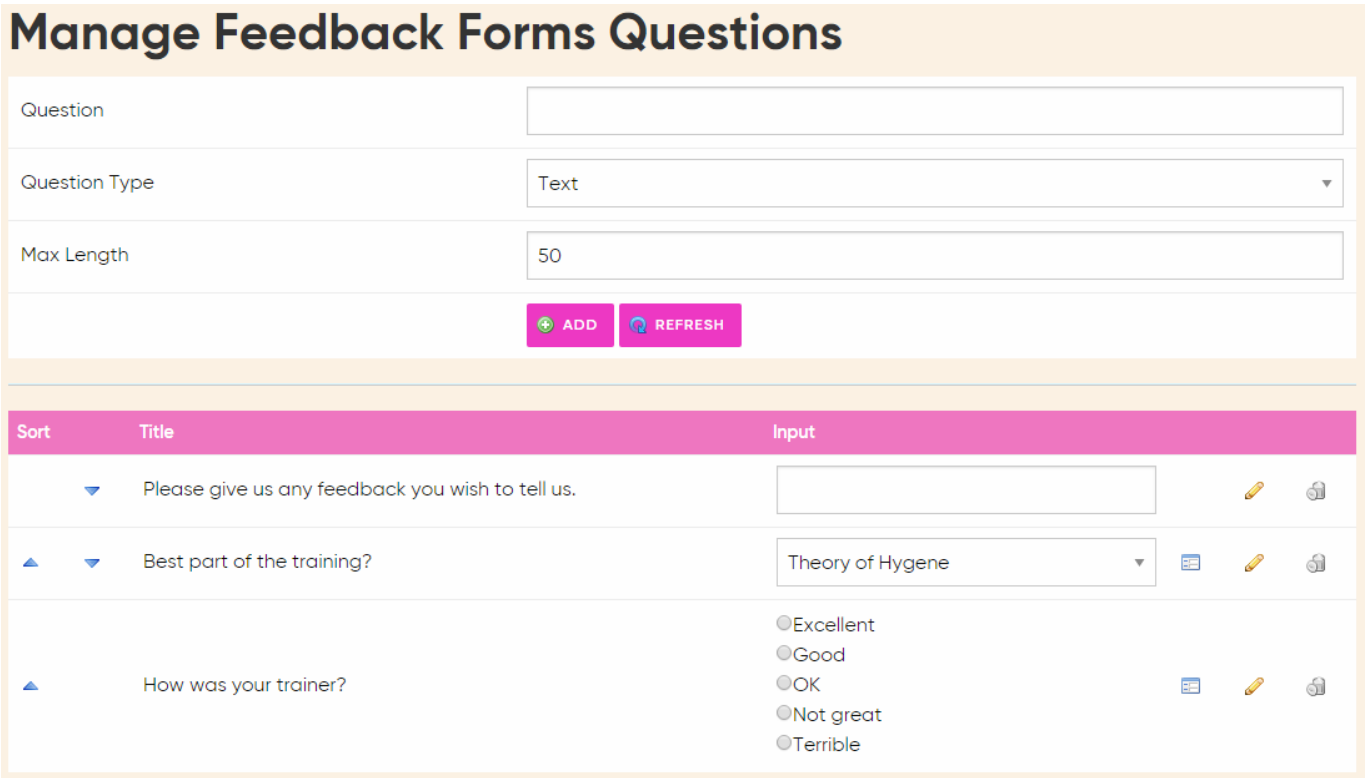
### How was your trainer?

| | |
|---|---|
| Excellent | 1 (50%) |
| Good | 1 (50%) |
| OK | 0 (0%) |
| Not great | 0 (0%) |
| Terrible | 0 (0%) |

| Feedback by person | Please gi... | Best part... | How was y... |
|---|---|---|---|
| Staff Member 1 | I enjoyed it | Theory | 10 |
| Staff Member 2 | It was good but a little long | Theory | 8 |

### 11.10.1. Question Management

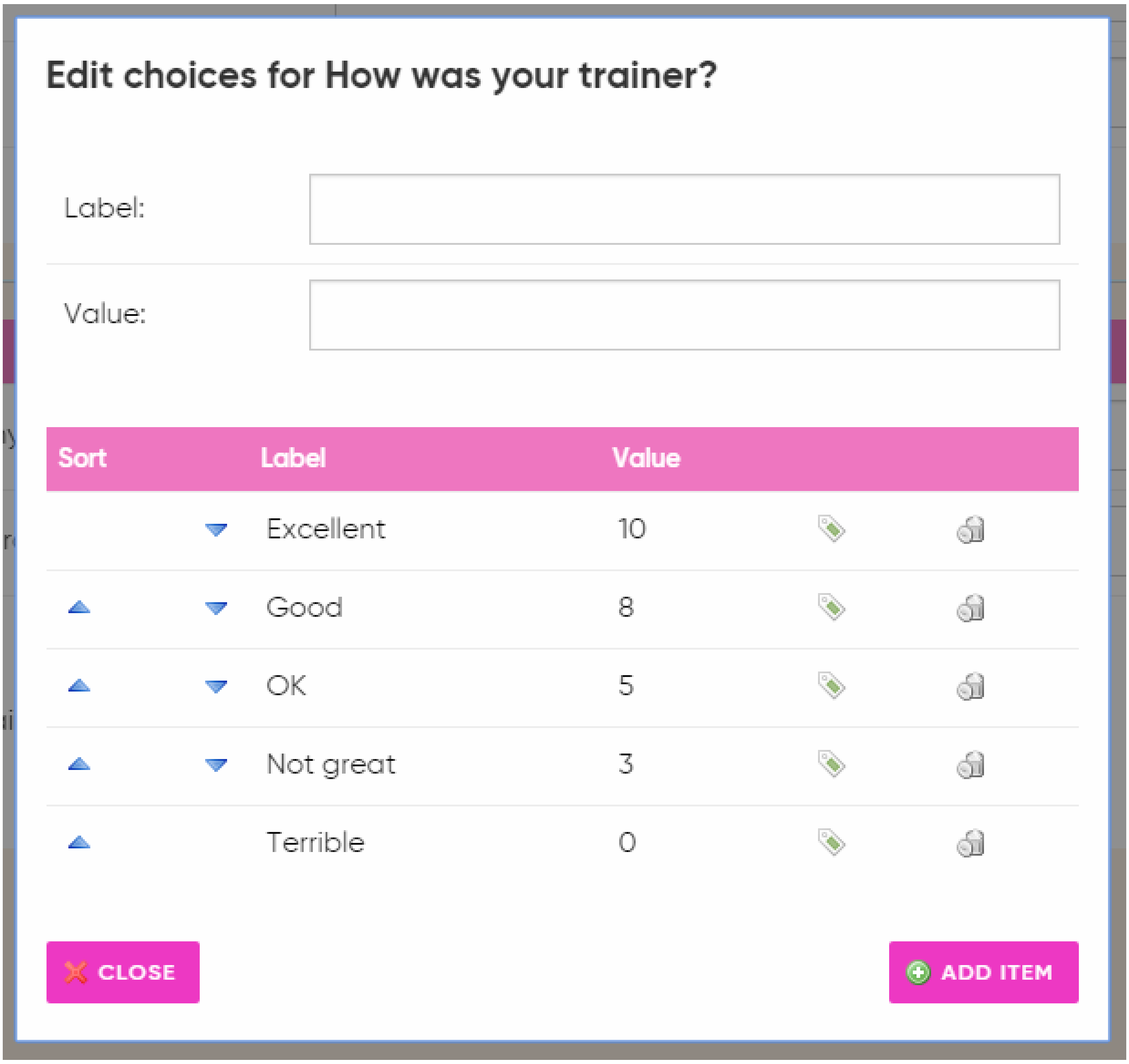
Use the form at the top of the page to add a question. Once the question is in the list below then you can click on the blue form icon to edit the answers for that question.



# Manage Feedback Forms Questions

| | |
|---|---|
| Question | |
| Question Type | Text |
| Max Length | 50 |
| | ADD REFRESH |

| Sort | Title | Input |
|---|---|---|
| | Please give us any feedback you wish to tell us. | |
| | Best part of the training? | Theory of Hygene |
| | How was your trainer? | Excellent<br>Good<br>OK<br>Not great<br>Terrible |




To add an answer to the question, enter the label shown to staff and a value you want to see in the results (they can be the same). Then click Add Item.

At the moment, it is not possible to edit an answer so simply remove it and add a new one to replace it. Use the blue arrows to move the items in the list.

You can also set a default answer if required by using the green label icon.

All of the changes are updated and saved instantly so just close the popup when you are finished.

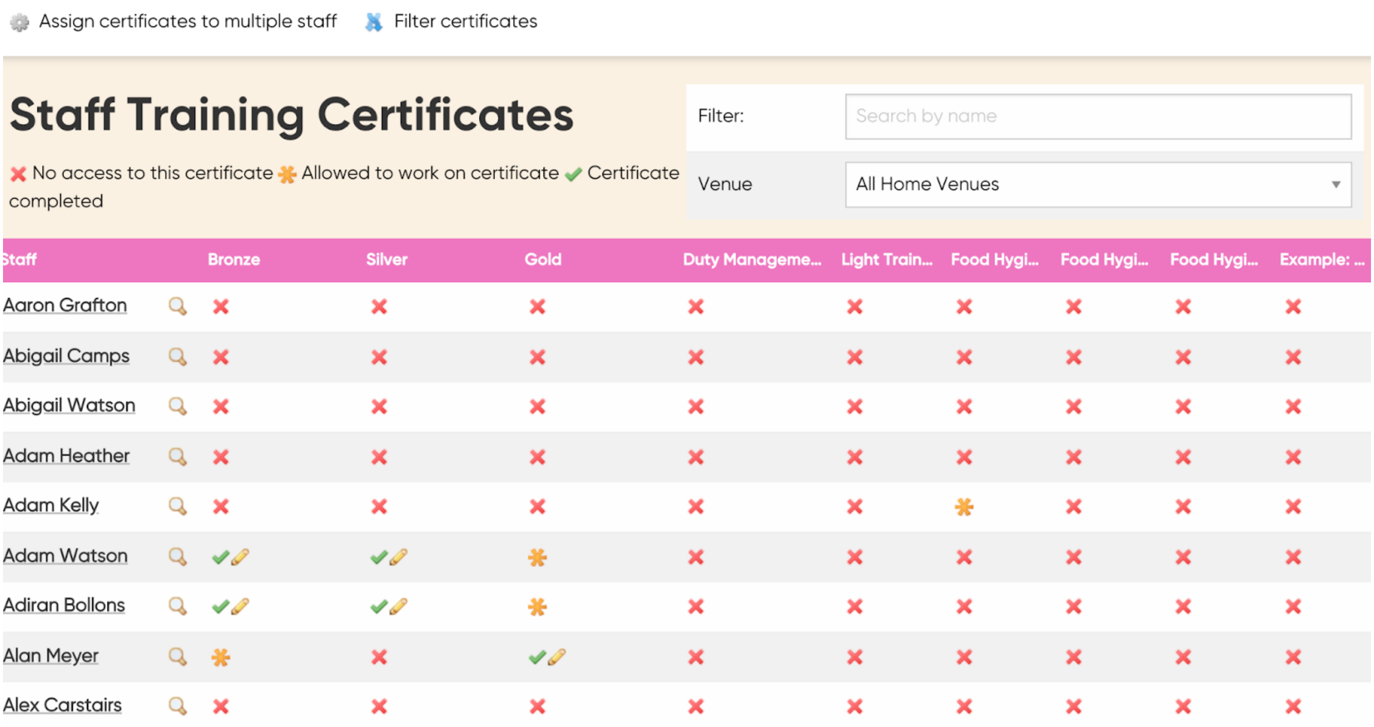
## 11.11. Assigning Training Stages / Staff Training Stages

Be default staff do not have access to any of the training stages.

There are three ways in which staff are assigned to training courses.

- It is a requirement on a role they are assigned to (see Roles).
- They have completed a training stage and have been granted automatic access to the next stage (you can configure this on each stage).
- You manually assign them.

To manually assign staff or see the general status of each staff member, go to Training > Staff Member Training Status > Staff Training Certificates.




The page shows each employee followed by all of the training stages in your StaffSavvy. The legend in the top left shows the status of each employee for each stage. You can filter the list of staff by names or venues using the filters in the top right.

You can also choose which training stages to see in the list. Use the option in the Action menu to change which stages you are managing.

Clicking on the red cross will change the icon to the yellow star which indicates that the staff member has access to that stage.

Clicking on it again will mark the stage as complete and allow you to set the pass date and upload a certificate by clicking on the edit pencil icon. The pass date will be used for stages that expire after X months to warn you and the employee that the training is expiring.

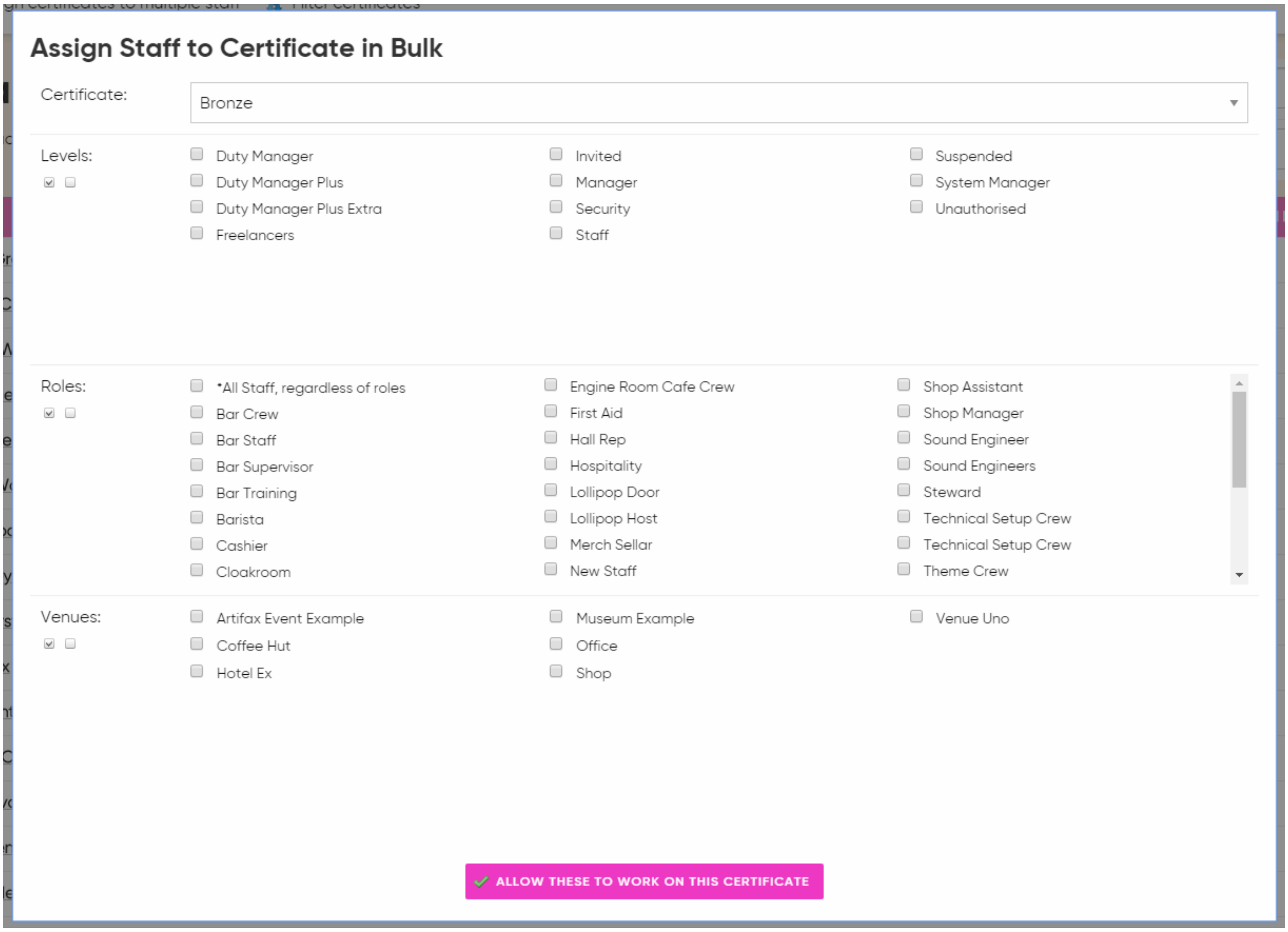
Clicking on the green tick will return the status to the red cross (no access).

All changes are instant on this page but no emails will be dispatched so you can update this as needed.

### 11.11.1. Granting Training Access in Bulk

You can use the bulk feature under the Actions menu to approve multiple staff in one go. This popup allows you to grant access to a training stage in bulk to multiple staff members.

The three filters; Level, Venue and Role must all be matched for a staff member to be given access. As you select your filter options, confirmation of how many staff will be included in this filter will be shown at the bottom of the popup.



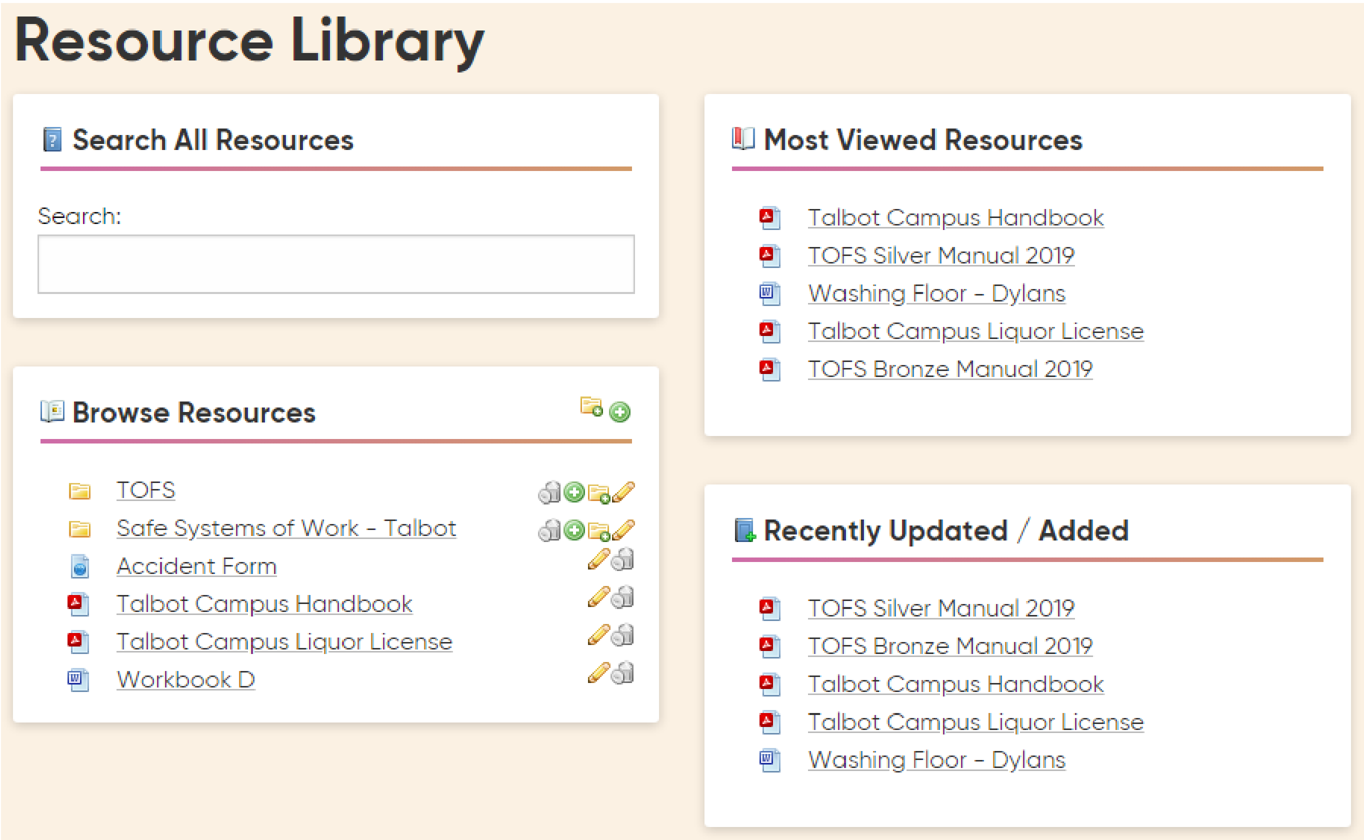

 

# 11.12. Resource Library

The resource library is the best location to store all of your official documents so that staff can access them anywhere and anytime.

You can direct new staff to read/download items in your resource library as part of your on-boarding process.

The library allows you to create individual documents but also a folder structure to keep them organised.




Each document in the library can be one of three options:

- **File**
  This allows you to physically upload a document that will be downloaded by staff. We recommend you upload PDF versions of Microsoft Word or other proprietary document types as not all staff will have Word available on their laptops, tablets or phones so they won't be able to read the item.
- **Page**
  This allows you to add your own text and images to the page so you can keep it up to date. This might be useful for certain instructions or policies that change. It can also be used for keeping notes about how certain things must be done within the venue/organisation.
- **Link**
  This allows you to send the staff member to a different website where the information is stored.

- **Digitally Signed Document**
  This option allows you to link a digitally signed document through to the resource library so that staff can easily find forms to be completed. It will link them directly through to the form for their completion.
- **Welfare and Performance Form**
  This option allows you to link a performance form through to the resource library so that staff can start a performance form easily from this location. It will assign a new form and direct the staff member to start completing it.

You can restrict library items by roles/skills so only those staff who need to see a particular document will have access to it.

# 12. Communication

## 12.1. News

StaffSavvy's News feature allows you to easily send email communication out to staff or to post new items to the site for future reading.

**This should be the default way of communicating to staff.**

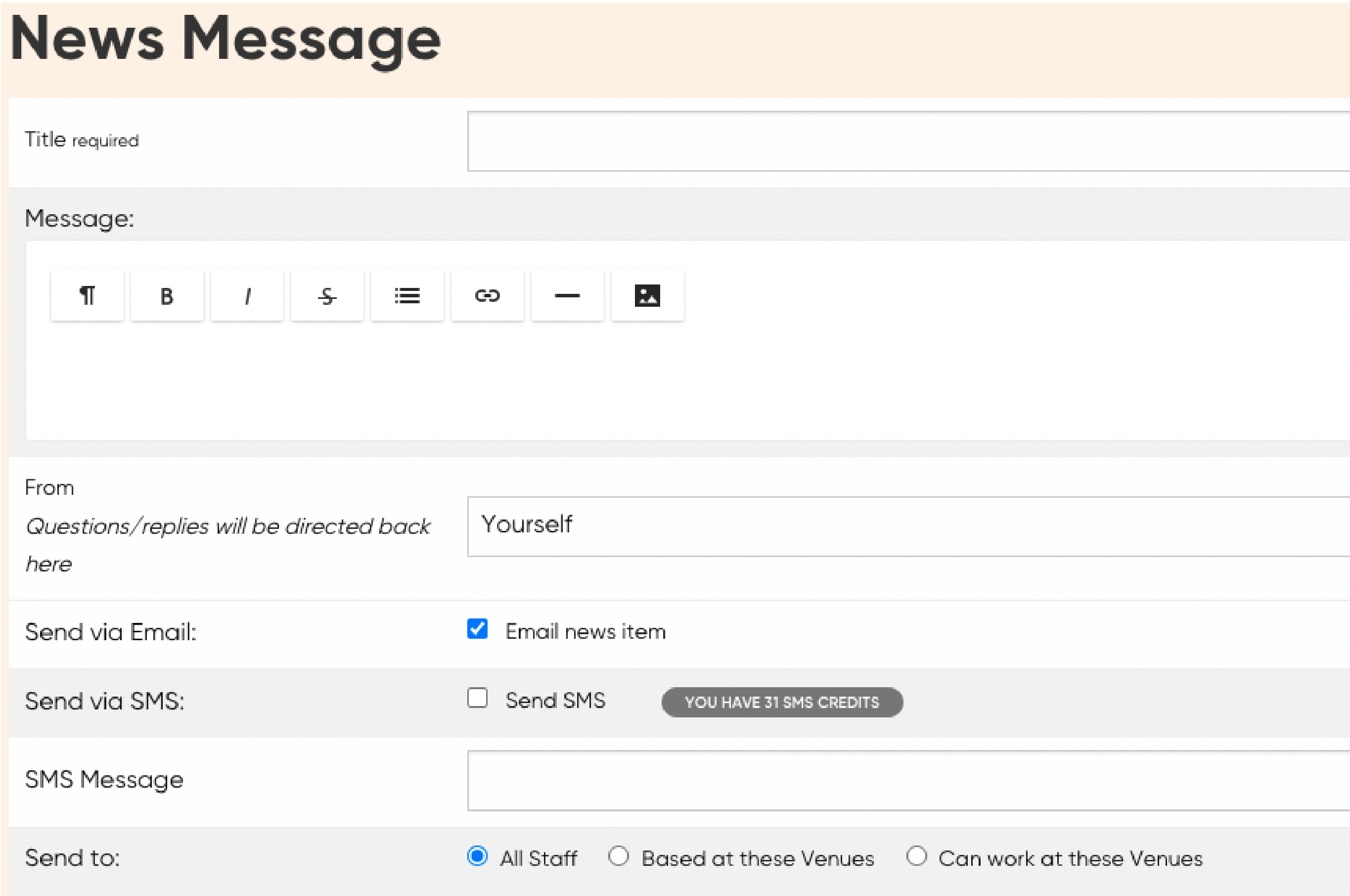
News is a passive communication meaning that staff are not forced to read it and can simply ignore the message. News is shown on the dashboard and new items are highlighted for attention.

When creating news, you can choose different segments of your staff to receive the news message. You can control who has permission to create news with the dedicated permission that you can assign to levels. This will grant them permission to create news and send it to accounts they have access to. All accounts will have the My News section automatically. You can Add news by navigating from Staff > News > Add News.

Through the site, staff can send a personal message to the person who created the news article if they want to reply or ask a further question.

You can configure useful settings such as publication date, expiry date and push notifications for the information.




SMS messages are limited to 140 characters so the site will ask you to create a condensed version of the message to send via SMS. Please note that each SMS will cost a credit to send so ensure you only send to the staff you need to.

Staff can see all of the news items you have sent them (as long as they have not expired) within their account. You can add Filters to specify who is sent out the News; these can be limited to specific roles, teams, working specific days.

## 12.2. Alerts

Alerts are an active and auditable communication tool. Assigned staff are informed of the alert and told they must log into the site to see the message. Create an Alert via Staff > Alerts > Create Alert. You can specify who receives an alert by role/days/teams/contracts/access levels.

When a staff member logs into the site, they are forced to see the message and acknowledge it before they do anything else on the site. No other actions can be done at all until the message is acknowledged.

This method provides you with a report of each staff member, when they acknowledged the alert and how long they read the message for. This allows you to see any staff members who have simply acknowledged the message without reading it.

Staff have permanent access to the alerts they have been sent.

In addition to requiring an acknowledgement, you can require an answer to a single question. This answer can be in the format of yes/no, multiple choice or a very short text reply. The provided information will be shown on the report with yes/no and multiple choice answers summarised into percentages too.

**We recommend alerts are used sparingly when an auditable response is needed and when you must be able to prove all staff have read the message. All other communication should use the news feature.**

# Alert Message Report

| Alert Statistics |
|---|
| 104 crew members assigned to this alert |
| 93 crew members (89%) have signed this alert |
| 57 crew members (61%) have agreed |
| 36 crew members (38%) have disagreed |

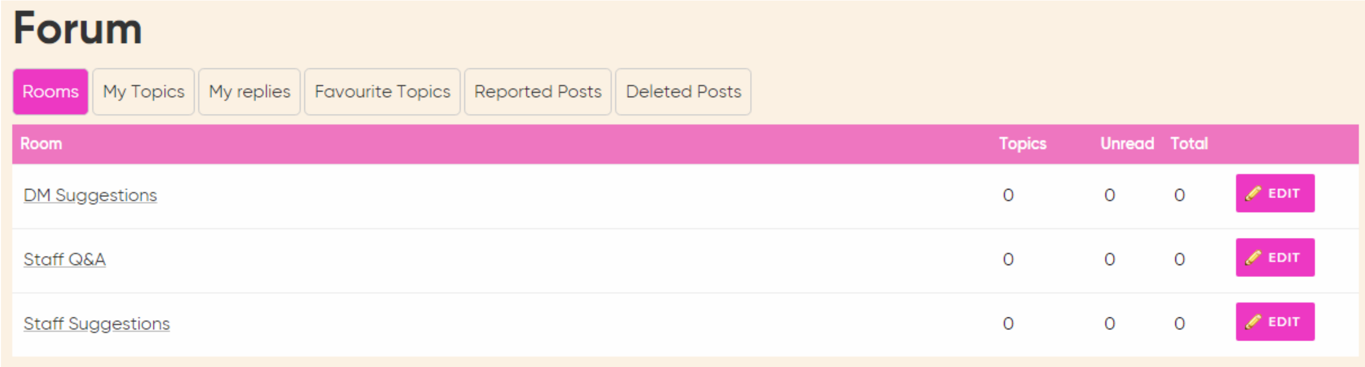
| Pos | Name | Date & Time signed | Time before reading | Read for | Response | |
|---|---|---|---|---|---|---|
| 1 | Adiran bollons (Aids) | Thu, Nov 27th 2014 | 03 hours, 17 mins | 00.07 mins | Yes | ✖ |
| 2 | Alan Meyer (Alan) | UNSIGNED | | | | ✖ |
| 3 | Alex carstairs (Alex) | Fri, Nov 28th 2014 | 23 hours, 41 mins | 00.51 mins | No | ✖ |
| 4 | Alex Cox (Alex) | Fri, Nov 28th 2014 | 23 hours, 01 mins | 00.18 mins | No | ✖ |
| 5 | Alex Huntley (Alex) | Fri, Nov 28th 2014 | 23 hours, 01 mins | 00.06 mins | No | ✖ |
| 6 | Alexander Gardner (Alec) | Fri, Nov 28th 2014 | 26 hours, 13 mins | 00.23 mins | Yes | ✖ |
| 7 | Alice bollons (Alice) | UNSIGNED | | | | ✖ |
| 8 | Alice Searle (Alice) | Fri, Nov 28th 2014 | 24 hours, 03 mins | 00.47 mins | Yes | ✖ |
| 9 | Amy Gerrard (Amy) | Fri, Nov 28th 2014 | 24 hours, 15 mins | 01.15 mins | No | ✖ |
| 10 | Amy Minton (Amy) | Thu, Nov 27th 2014 | 02 hours, 48 mins | 01.08 mins | No | ✖ |

## 12.3. Forum

The forum feature is relatively self explanatory as it allows staff and manages to discuss topics in rooms. Each room can be restricted by level so the discussion can be private. The Forum is situated under Training.

You can also restrict who can post replies so a room can be open to several levels but only the highest level staff can post replies.




### 12.3.1. Discussion vs Q&A

Each room can be either an open discussion room or a Q & A room.

Open discussion allows for a full thread of messages back and forth between all parties in the order they were posted.

Q&A rooms will ask for an initial answer and then allow staff to post answers. Other staff can vote an answer as correct and the best answer will be shown directly below the question. All other answers are then displayed below.

## 12.4. Awards

This allows staff members to nominate colleagues for awards. Nominations can be approved by managers and the awards display on an awards stream. Awards can be your own design or use our pre-set images.

Ensure your new awards feature is enabled, go to your System > Configuration > Global Settings. Click on the Features tab and enable Awards.

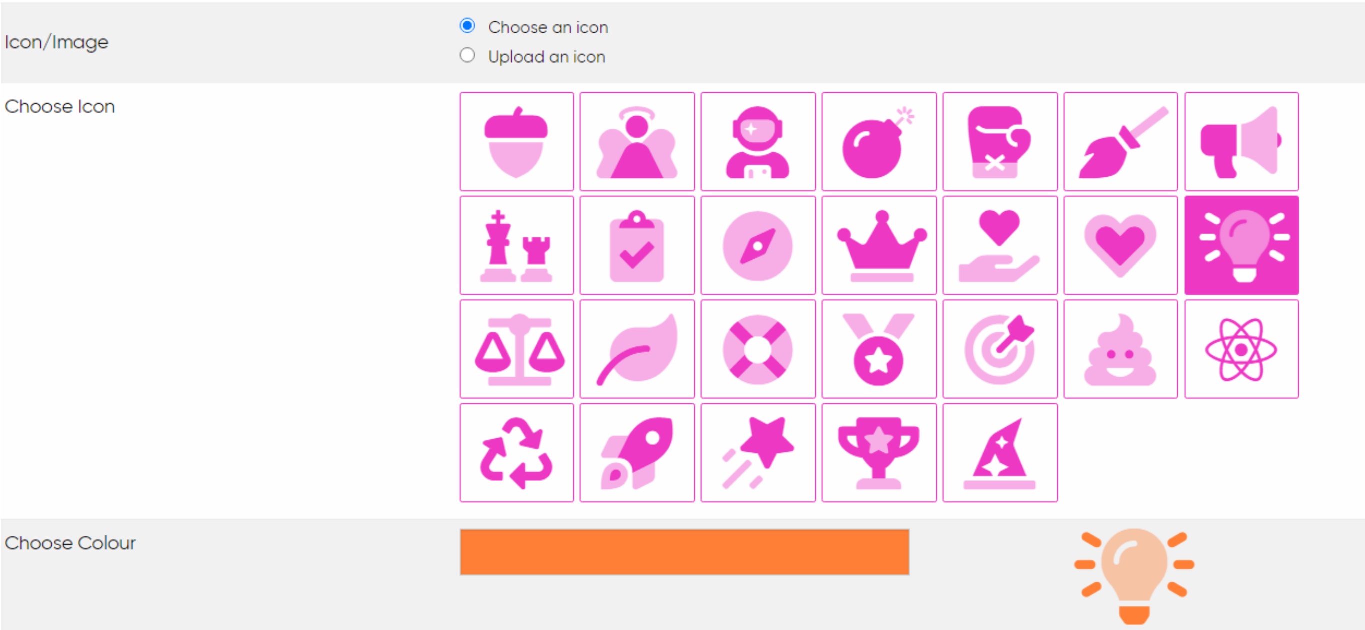
Once turned on, use the menu search for Awards and choose Manage Awards. Or go to Staff > Staff Settings > Manage Awards.

Use the Create a new award button to get started.

Enter the title for your award and then choose who can nominate this award. You will also need to choose one or more of the levels or roles so they can approve them too. Just use the ‘Can Approve’ checkbox on the right side. You can use any combination of levels and roles.

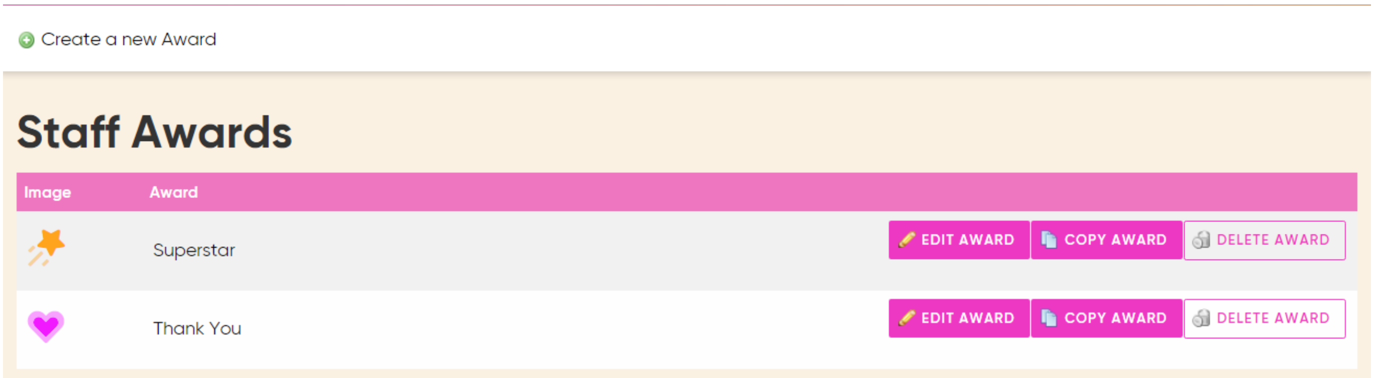
Then it’s time to set up the actual award. Choose to upload an image or use an icon we’ve provided:



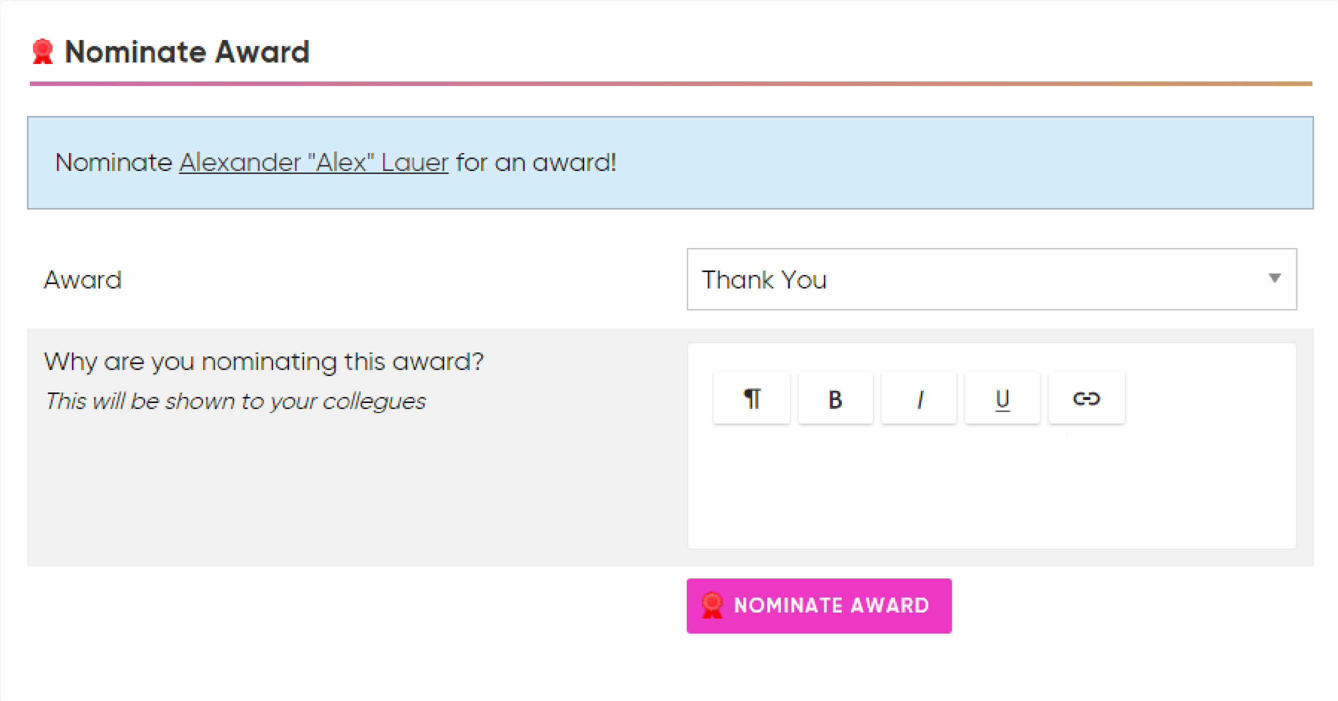

For icons, you can also choose the colour. Once selected, you'll see a preview of the award.
For images you upload, we recommend a 200px by 200px transparent background PNG. Please remember that some staff view the site in high-contrast mode or dark mode so it needs to work in all situations.

Once saved, this will instantly be available for staff to nominate. You can copy, edit and remove awards anytime from the Manage Awards page.




### 12.4.1. Nominate an award

There are two ways to allow nominations of awards. By default, this is done via a staff member's profile. Simply go straight to the staff member's profile. Under their new Awards tab, you'll see the option to nominate an award:

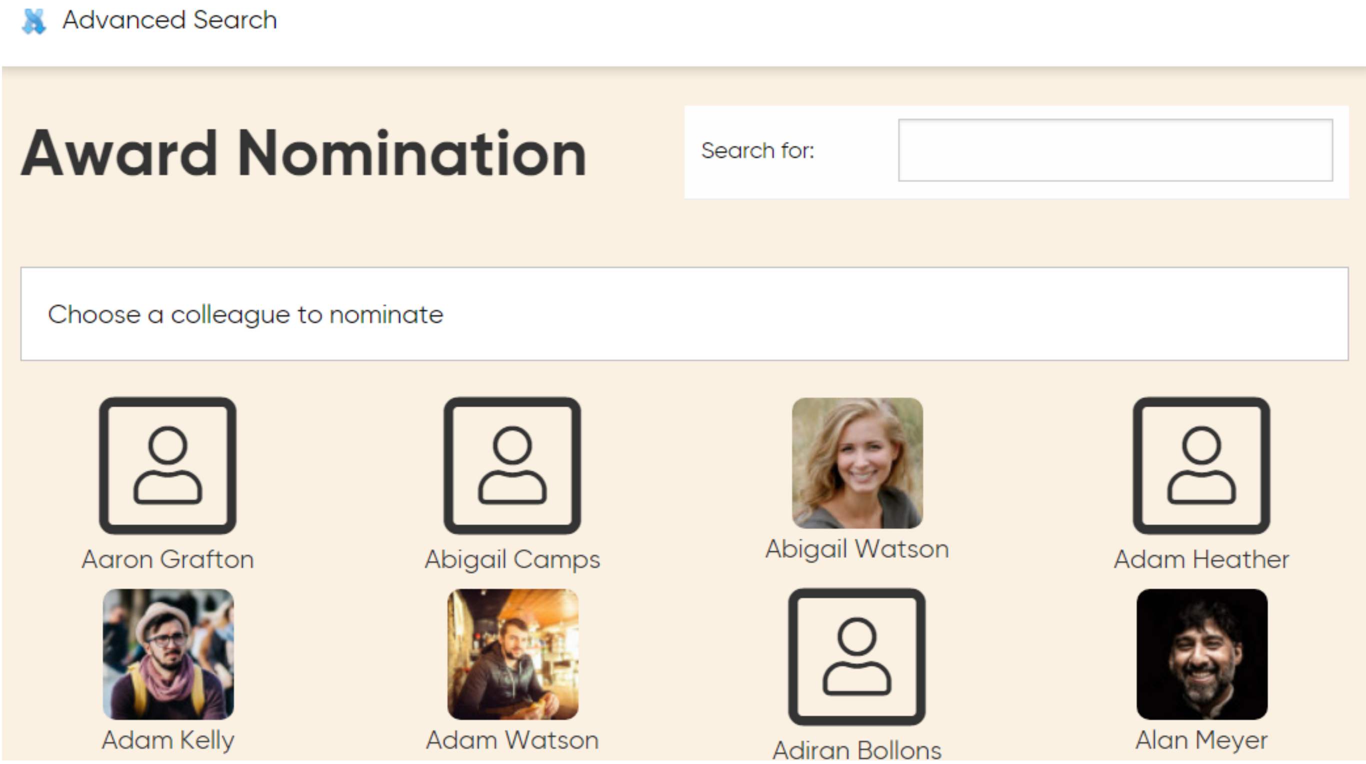



If you can approve the award then it will instantly be added to the staff member's page and show up on the new Awards feed.

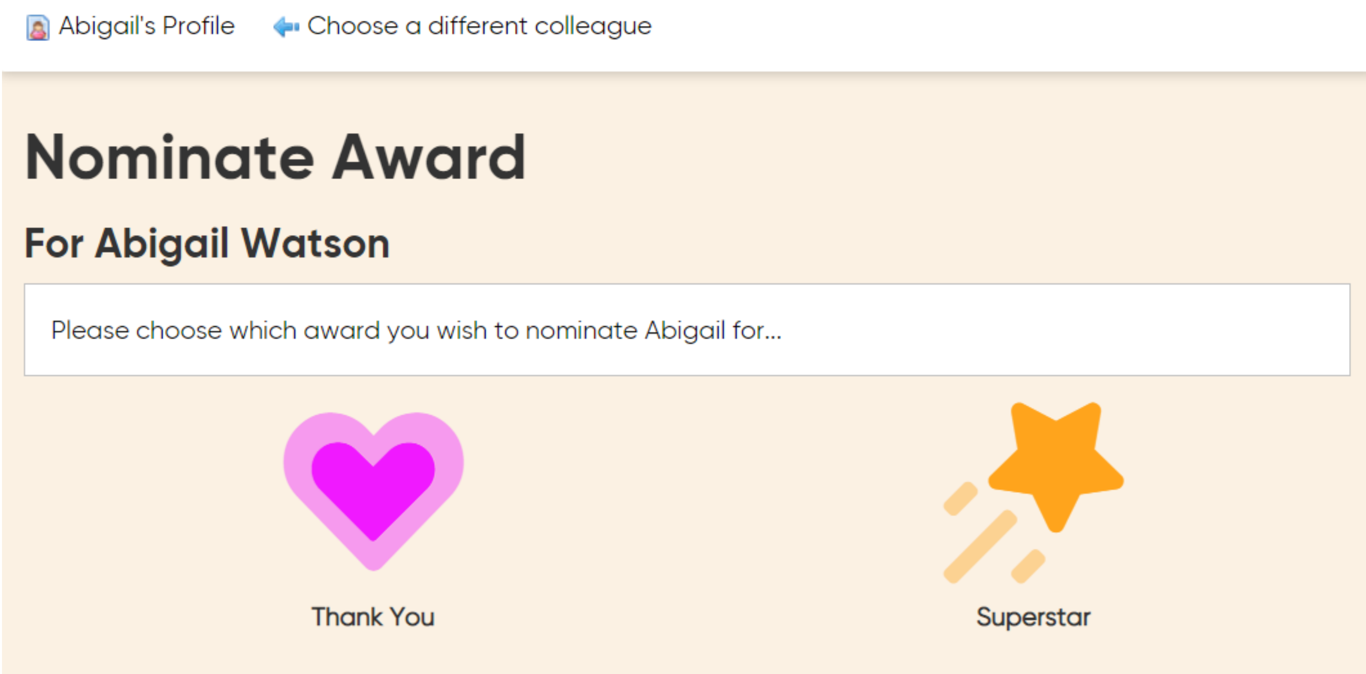
You can also grant permission to nominate any staff member for an award. This grants permission to view all staff within the system and nominate them for an award; even if you wouldn't normally see their account. The permission is called "Nominate Awards to any Staff Member"

Staff will then receive a menu option to nominate an award which will load a page of staff with a filter option:



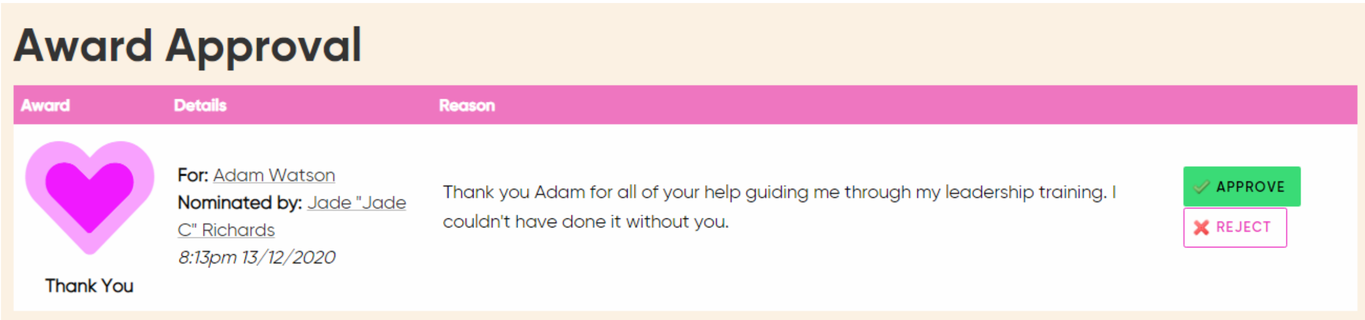

Choosing a staff member, will allow you to choose the award to nominate:




And then finally to complete the reason for the nomination and to confirm the request.

### 12.4.2. Approving Awards

New nominations will appear in your notifications box on the dashboard automatically. The approval process is straightforward; if you choose to reject a nomination then you should provide a reason in the popup.




Approved awards will instantly be emailed through to the staff member and they will appear on the new awards feed page. This page displays all of the awards for staff you have access to across the organisation.

Awards can also be seen on each staff member’s profile page.

## 12.5. Staff Events

Staff Events can be set up for a variety of reasons and can also be used to collect optional feedback from staff.

The events are always optional and can be opened to just particular skills and venues within the organisation.

Each event has the following settings:

- **Title**
  Title for the event that will be shown to staff.
- **Start**
  Start date and time for the event.
- **End**
  End date and time for the event.
- **Description**
  For telling the staff what the event is about.
- **Spaces**
  Specify the number of staff members that can sign up for this event. Set to 0 to allow an unlimited number.
- **Lock Sign Up**
  This is the date and time that sign up to the event will be locked. Staff will be told this time so they can sign up before the cut off time. Useful if the event requires organisation once numbers and answers have been received.
- **Roles**
  These are the roles that the event is open to. You can use the checked and unchecked icons at the top to

select all or unselect all options. Only staff with one of the selected roles assigned will be shown the event.

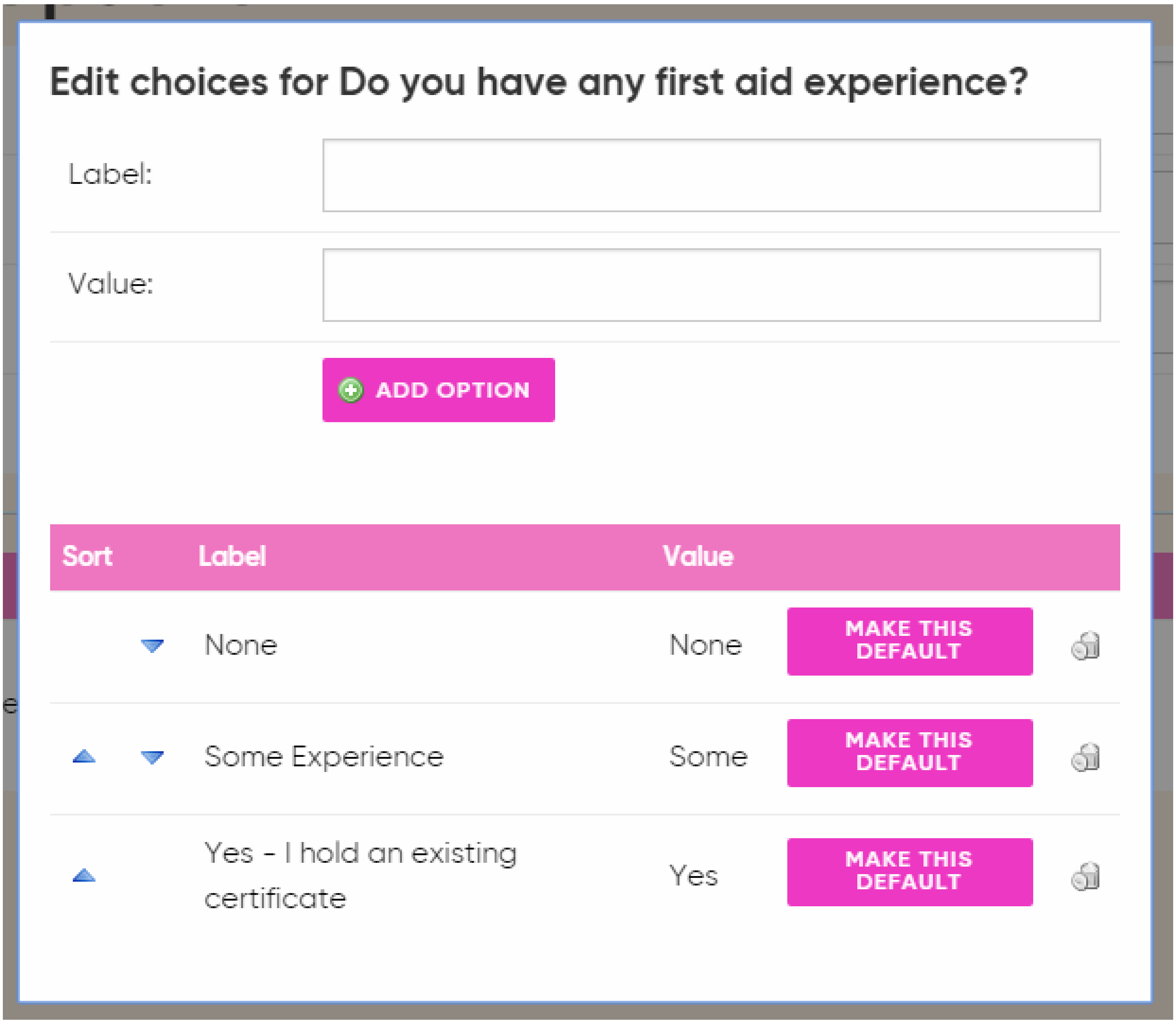
- **Venues**
  This allows the event to be assigned to just a single venue or to an operations group. Only staff assigned to the venue/venues in the opts group will see the event.
- **Approve Each Attendee**
  This option means that staff apply to attend the event. They can then be reviewed (a notification appears on the dashboard for managers who can set up staff events). Attendance requests can be accepted or rejected.
- **Active**
  This allows you to prepare an event but not have it shown to staff until you activate it.

Staff can only sign up to an event if they are not booked on shifts or training at the same time. Once they have registered, StaffSavvy will not allow them to be scheduled for shifts or booked on training at the same time.

### 12.5.1. Adding Sign Up Options

Click on the Edit Questions to create and edit questions. Then use the form at the top of the page to add a question. Once the question is in the list below then you can click on the blue form icon to edit the answers for that question.




To add an answer to the question, enter the label shown to staff and a value you want to see in the results (they can be the same). Then click 'Add Item'.

At the moment, it is not possible to edit an answer so simply remove it and add a new one to replace it. Use the blue arrows to move the items in the list.

You can also set a default answer if required by using the labelled button.

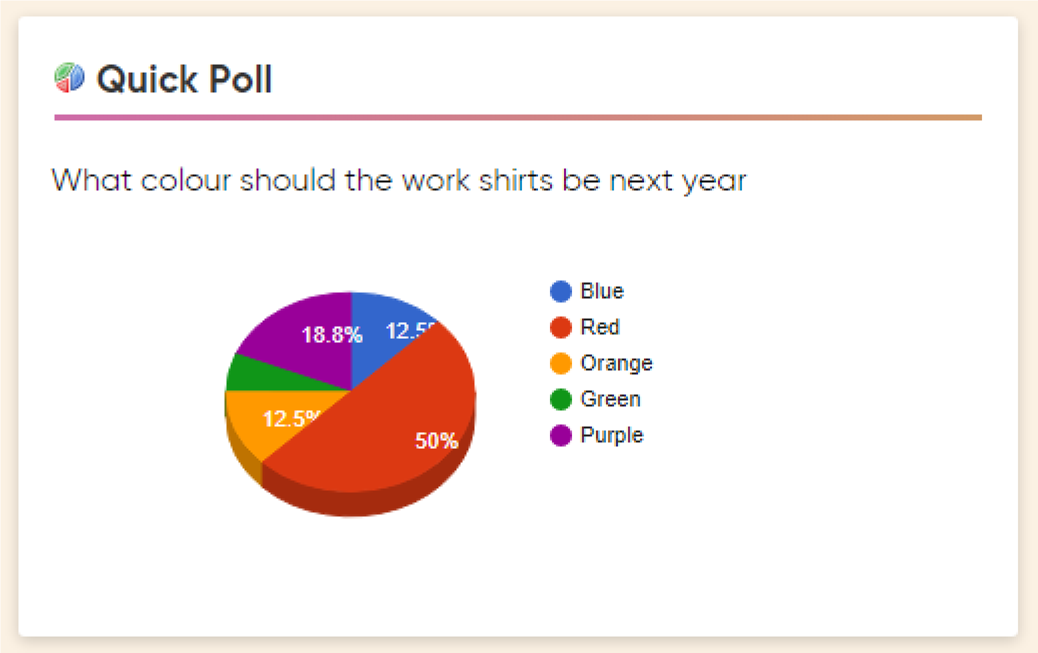
All of the changes are updated and saved instantly so just close the popup when you are finished.

### 12.5.2. Viewing the Event Information

You can view a summary of the responses using the view report on the event listing page. This will also provide you with a CSV export of each staff member's response.

## 12.6. Polls

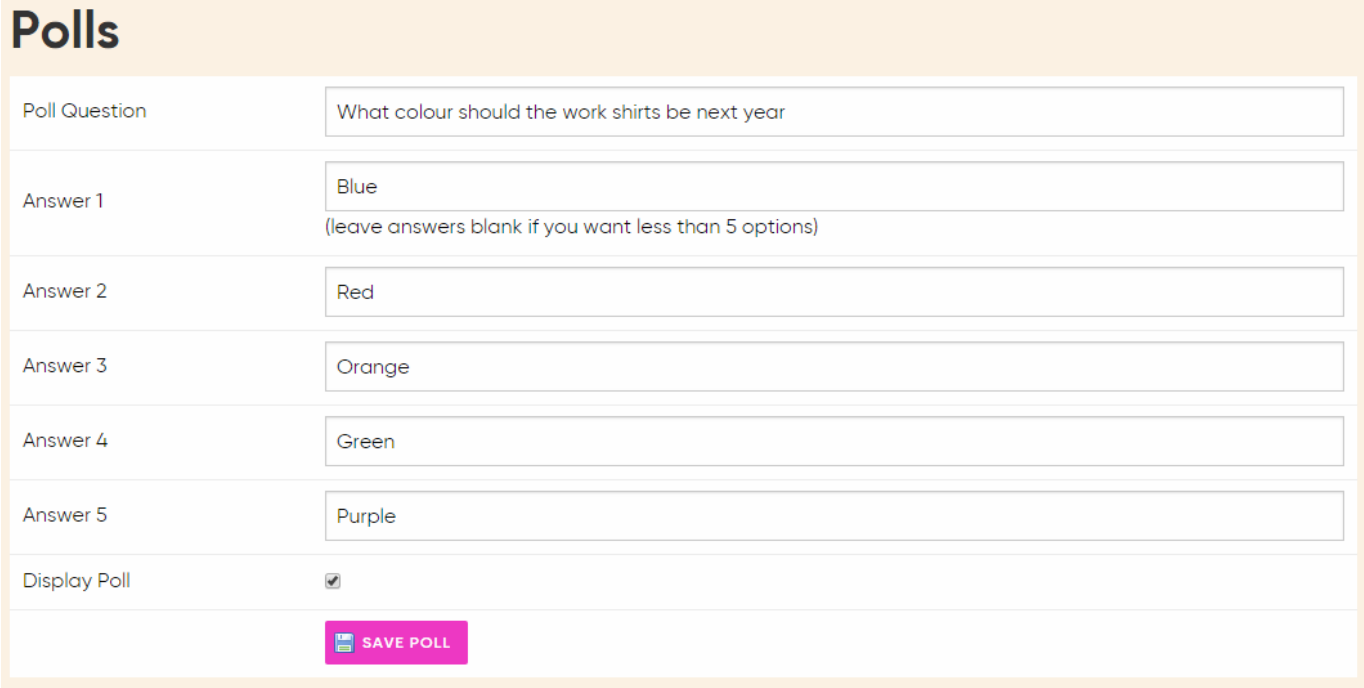
Polls allow for quick feedback to be received from all staff in Staffsavvy. You can select up to five answers for the poll. Questions are shown on the dashboard to all staff and await their answers.




Only one poll can be active at any one time and it will remain active until it is taken off or another poll is set to be active.

Staff are shown results from the poll once they have entered their opinion and you can see a full breakdown of the results within the Manage Polls page.

Results are anonymous so use these for general feedback only.


Polls
Poll Question
What colour should the work shirts be next year
Answer 1
Blue
(leave answers blank if you want less than 5 options)
Answer 2
Red
Answer 3
Orange
Answer 4
Green
Answer 5
Purple
Display Poll
SAVE POLL

# 13. Assets

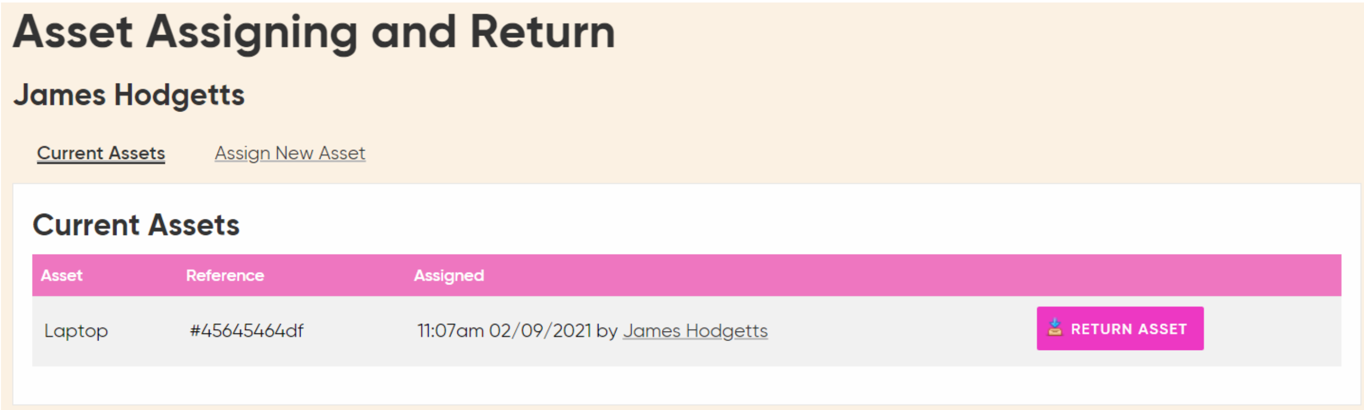
There are two types of assets; long-term loans and shift assets. Long-term loans are designed for items assigned to staff for long periods of time. Shift assets are only used during a shift and are returned.

## 13.1. Long-term Assets

Create a new asset with the option of Assigned long-term to staff chosen.

You can then access the asset assigning screen under the Actions menu of the staff member's profile.

From there, you can assign any number of the long-term assets as well as return currently assigned assets.




Both long term and shift-based assets will appear within the asset log for that staff member.

## 13.2. Shift Assets

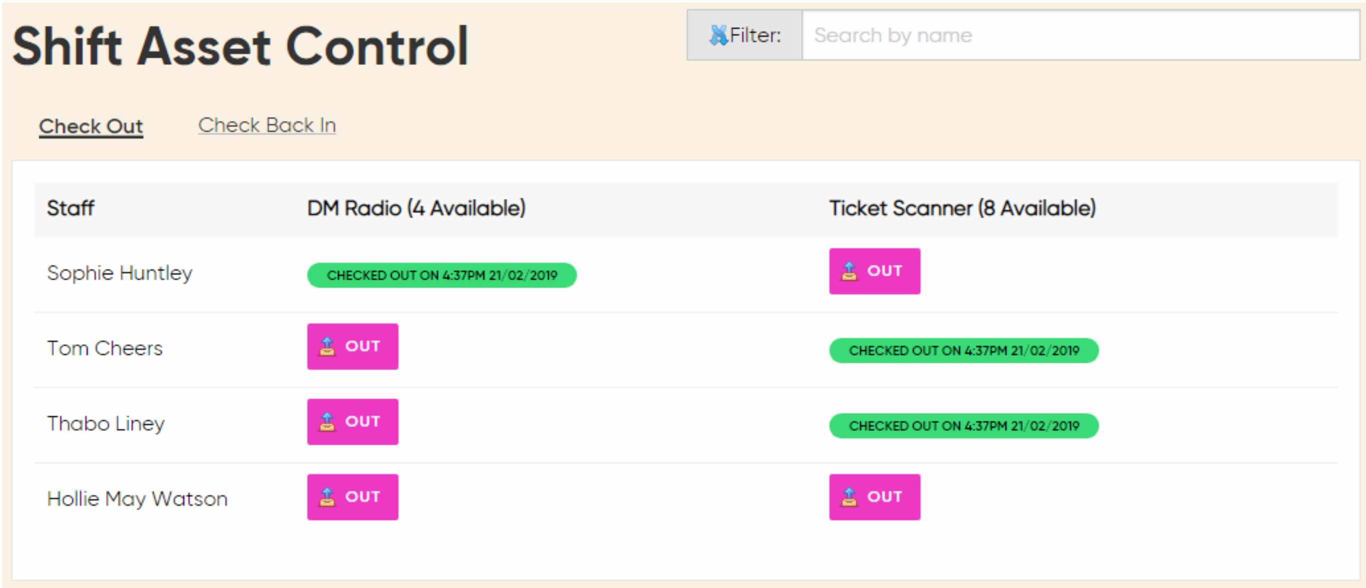
Shift assets allow you to record when staff take particular items for use during a shift. The system can record items being checked out and back in. This does require staff to be clocked in.

This option is enabled under the Global Settings > Features tab. You will then get the option to add Assets under Shifts > Shift Settings > Manage Shift Assets.

Each asset type can have a title and the number of items you want to track. This will prevent too many being lent out and will record how many you have remaining at any one time. You can also choose to record the asset reference (e.g. a number or code) to identify the actual unit. These references do not need to be entered, we'll allow staff to choose common references and simply type in new references when they check out an item.

Once set up, you can then log assets in and out. Reach this page under Shifts > Asset Check In/Out.

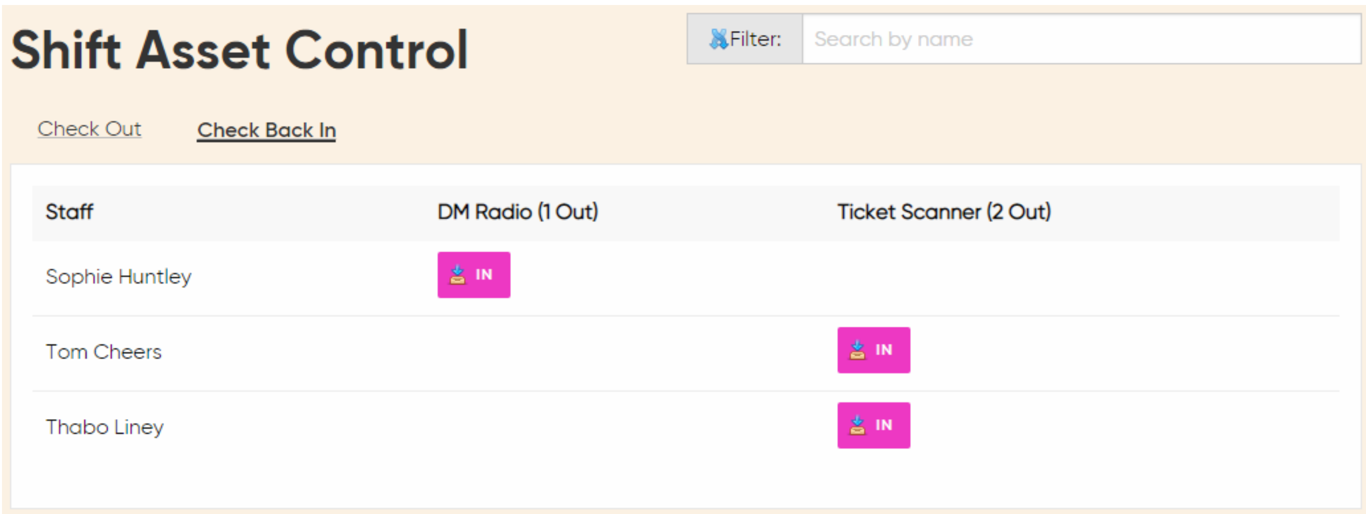
 




Above you can see the shift assets listed out and every clocked in staff member is shown. Managers can simply click the 'Out' button to register that a staff member has taken an item for the shift.

The system actively tracks who has which items for which time period and can later provide reports on who had items during specific time periods.

To return an item, the Back in tab lists who has which items and a quick click of the In button will return it:



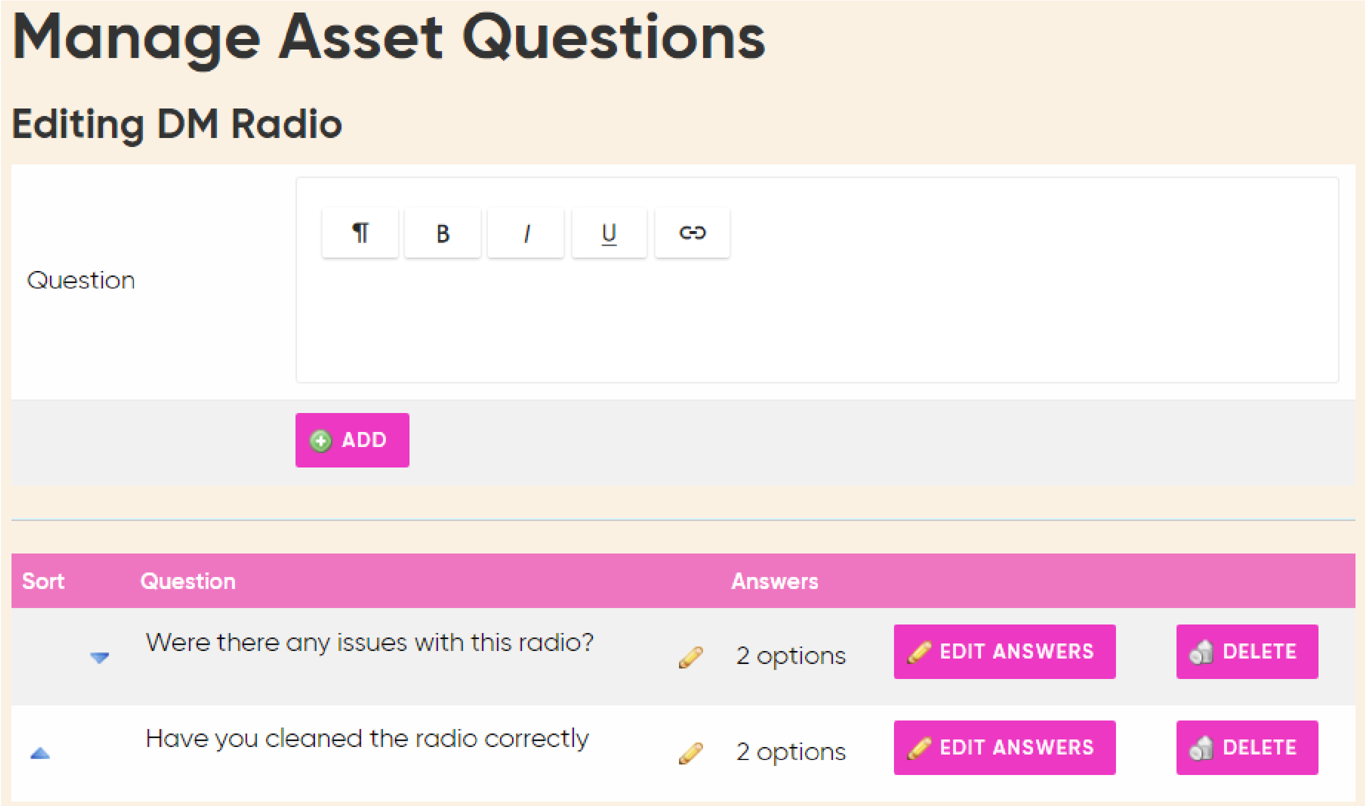

You can add as many shift assets as you desire and manage how many of each asset you have available.

### 13.2.1. Asset Return Questions

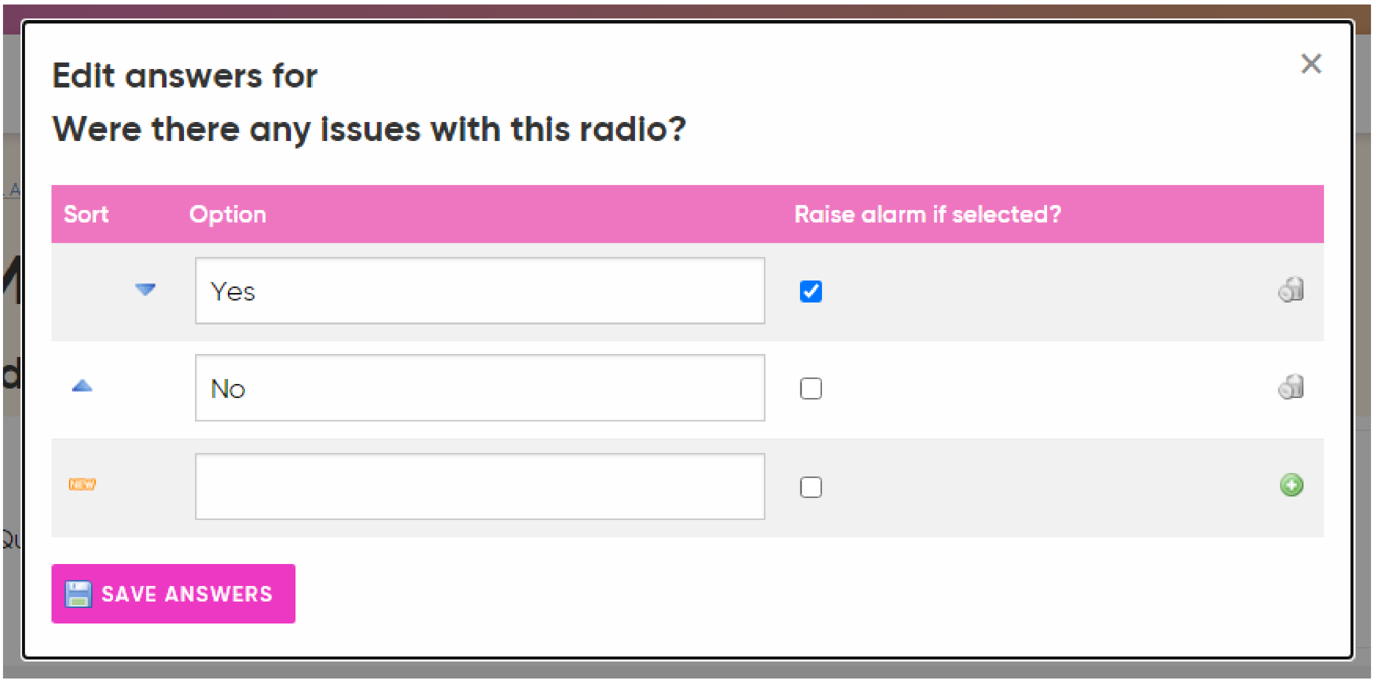
From the Manage Assets page (under System > Configuration), you can use the Add/Edit Question option to create check in questions for each asset.

The questions must be multiple choice but you can have as many questions as you need.




With the question answers, you can choose if a particular answer should raise an alarm. The alam option allows the system to only send notifications when an asset is returned and certain answers are provided.



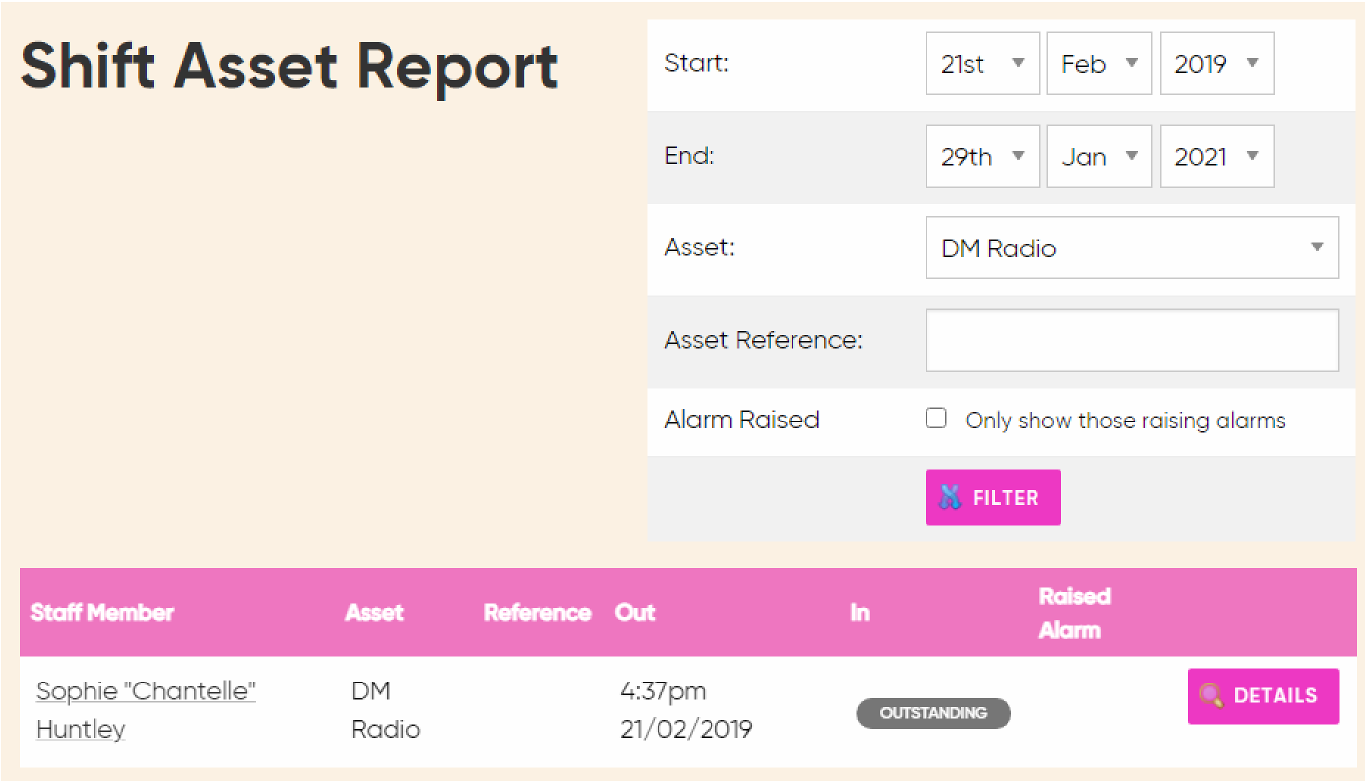

To set up notifications on asset returns, use a Trigger and choose the asset return event from the drop down.

Whenever an asset is returned, the system will ask these questions about the asset so that the information can be collected.

### 13.2.2. Asset Log Reports

From the Manage Assets page, you can view an asset log. This report will display all asset movements during a timeframe.

You can filter the asset logs by an asset and also only to show you the entries where an alarm was raised by the answers provided on the item's return.




You can also access the same report from a staff member's profile; this allows you to see all assets that they have checked in and out over a date range.

# 14. Reports

The reports section gives access to standard pre-built reports and the powerful custom reports.

## 14.1. Daily Review

This is the daily review report to assist managers and supervisors in reviewing all activities within their venues and confirm time worked along with absences and other payments.

All dates listed on this report have items that have not yet been reviewed and we recommend this report is checked daily so items can be reviewed and approved as close to when they happened as possible.

This prevents confusion and memory loss from those present on the day.

## 14.2. Shift Reports

These are different views to show the planned (upcoming) shifts within the system. They often allow you to customise the views and customise access to them using the permissions.

## 14.3. Staff Reports

- **Work Eligibility Report**
  This report displays the status of all staff in the system. It allows you to filter by their current eligibility status as well as review the documents and adjust their current status.
- **Staff Availability Map**
  This report produces a colour code map of any given period of weeks along with their availability percentages of staff during that time. It allows you to see when there might be shortages in staffing.
- **Holiday Approval**
  This report allows direct access to review and approve holiday requests. A notification is also shown on the dashboard.
- **Holiday/Time off Report**
  This report displays three different views; a list of upcoming holidays, a list of all holidays within a holiday year and a calendar view of all holidays.
  The views can be filtered by team and there are also links to receive a iCal calendar feed into your online calendar (Outlook, Google Calendar etc)
- **Holiday Allowance Rolling**
  This report displays the total unused holiday for each staff member for a given holiday year and allows it to be rolled into the following year. You can also confirm that there is no holiday allowance rolling taking place for each staff member.
- **Absence Calendar**
  This report allows you to see a calendar view of all absences for a whole team or department. You can filter which absences to view along with options to choose which group of staff to view.
- **Authorise Awards**
  This report is displayed on the notifications panel too and displays all awards that are awaiting approval.

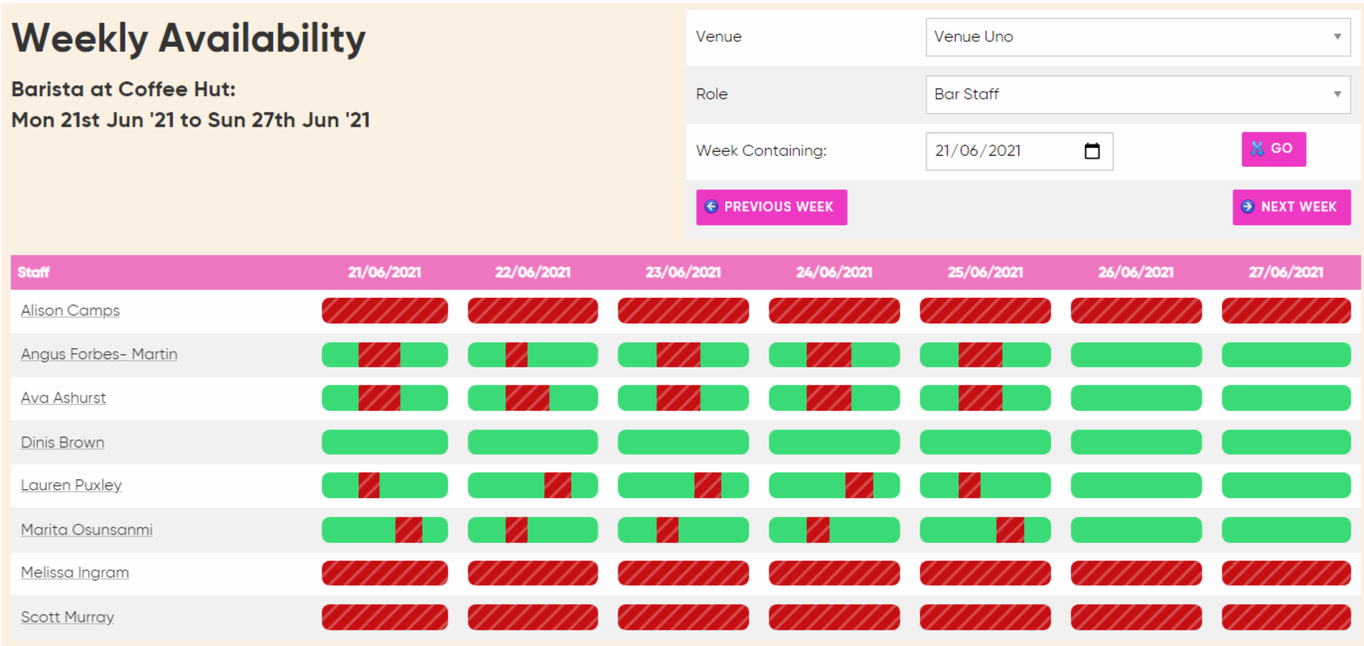
### 14.3.1. Week Availability Report

This report displays a week breakdown of staff availability for each day using the staff who can work at a venue and have a specific role.

The report can take a few minutes to generate due to the complexity of the information. The report will show traffic light of availability:

- Not available
- Asked not to work or a restriction that could be over-ridden by a manager
- Available

This report is available under Reports > Staff Reports > Week Availability Report




## 14.4. Time Entries & Pay

### 14.4.1. Pay Report

This pay report allows you to filter by a date range and see all entries paid to staff during that time. Expand each person to see all of the items.

You can also see summary totals using the Pay Element Groupings.

### 14.4.2. Cost Code Report

This report allows you to see the total staff cost per cost code over any defined period.

### 14.4.3. Time Entries Listings report

This new report mirrors the shift listings report that has been a staple of the system for many years. The report allows you to view time entries in different formats across multiple venues and date ranges.

It's useful to be able to view, export or print time entries. You can use the Quick Reports on the left to choose common combinations or build your own bespoke report on the right.

*To use: Find this report under Reports > Time Entries and Pay > Time Entry Listings.*


## 14.5. Specific Permissions for staff members approving Time Entries

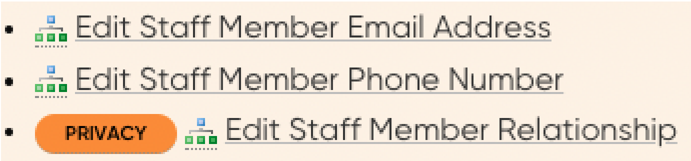
Staff Members can be granted access to certain items but excluded from their own items. This can allow all venue managers to approve the time entries that take place at a venue they manage except they would not be able to approve or edit their own time entries.

This option can be applied to any permission which can be granted to either line managers or venue managers.

To access this navigate to System > Configuration > Manage Permissions.

This will take you to a page that is full of different permissions that you can set access levels to. Some permission levels have hierarchical systems that mean that these are identified by a hierarchical icon as seen in the image below. For these permissions you can grant or limit access depending on hierarchical position, with the caveat that the staff member can not approve themselves, however, can be approved by a colleague of the same status in the company.




This can be turned either on or off by clicking the permission and either allowing or blocking the staff member from approving their own items.


## 14.6. Welfare and Performance

Under here, you can access reports for the check in forms and the performance and welfare reports. Here you can see which forms have been completed and filter them by both form and date range.

You can also access these reports under a staff member's account to see the forms that the individual has completed.

## 14.7. Non-attendance Record

There is a recorded entry of the number of shifts not attended, easily accessed on a staff member's profile under Shifts > Shift Stats and will remain as part of Shift history. This will come up as Unauthorised Absences.

You can view the details of the missed shifts and can add a note about absence if there is any relevant information about the absence.

If a valid explanation is given for the unexplained shift absence and changed to sickness it will be removed automatically from the record.

# 14.8. Custom Reports

This is a constantly growing tool to allow you to build a vast array of reports to help manage your staff and venues.

You can access your reports under the new menu option Reports > Custom Reports. From this page, you can create or edit your own reports.

If your reports are not showing up on this page make sure that you have allowed permission to view reports for the appropriate staff members.

The reports all have a 'Type' that sets what the first column will be:

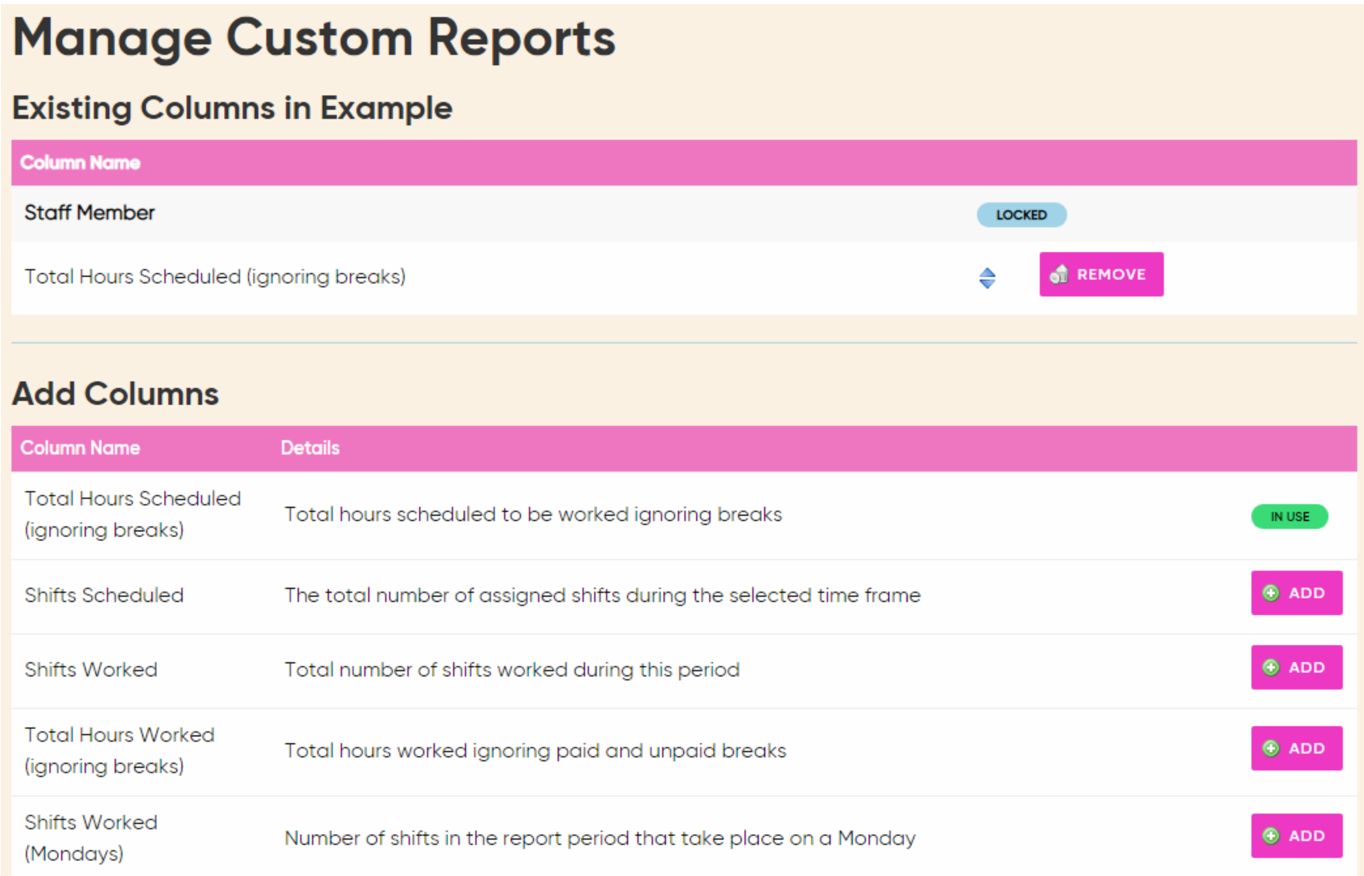
- **Staff**
  All currently active staff will be on this report.
- **Staff (new starters)**
  Choose a date in the top right and it will display all staff who had an account created since that date.
- **Staff (leavers)**
  Choose a date in the top right and it will display all staff who have been archived since that date.
- **Dates (daily summary)**
  Displays a list of dates down the left and will provide figures for hours worked etc per day.
- **Monthly (monthly summary)**
  Displays a list of months down the left and will provide figures for hours worked etc per month.
- **Venues**
  Displays each venue down the left and provides summary figures for a date range you set per venue.
- **Venue Groups**
  Displays all venue groups down the left and provides summary figures for a date range you set for each venue group.
- **Roles**
  Displays each role down the left and provides summary figures for a date range you set per role.
- **Organisation Week Numbers (Dates and week numbers based on organisation's year start date)**
  Displays organisation week numbers down the left and provides summary figures for hours worked per week.
- **Absence Types**
  Displays each absence type down the left side and allows you to see absences and costs for a defined date range.
- **Absence Categories**
  Displays each absence type category down the left side and allows you to see absences and costs for a defined date range. You can also filter just to one absence type.
- **Training Certificates**
  Displays information for each of the training stages; this is often completion information so providing total staff numbers for each stage.
- **Training Programs**

Displays information for each of the training programs; this is often completion information so providing total staff numbers for each program.

- **Exams**
  Provides columns to report on each exam in the system. This can include total pass rates and failure rates in any given time period.
- **Recruitment**
  Displays positions that the company is currently recruiting for. Columns can be added to show the number of spaces available for each role and how the recruitment process is progressing.
- **Shifts**
  This is a report showing all created shifts within the system.
- **Time Entries**
  This is a report showing all time entries within the system. Use the status column to filter out deleted entries.
- **Absence Periods**
  This is a report showing all absence periods (including holiday) within the system. Use the Status column to filter by different statuses to see those cancelled, rejected, approved and pending.
- **Awards**
  This a report for each award nominated within the system.

You can then add any combination of columns to a report. This allows you to build up the report to your needs.



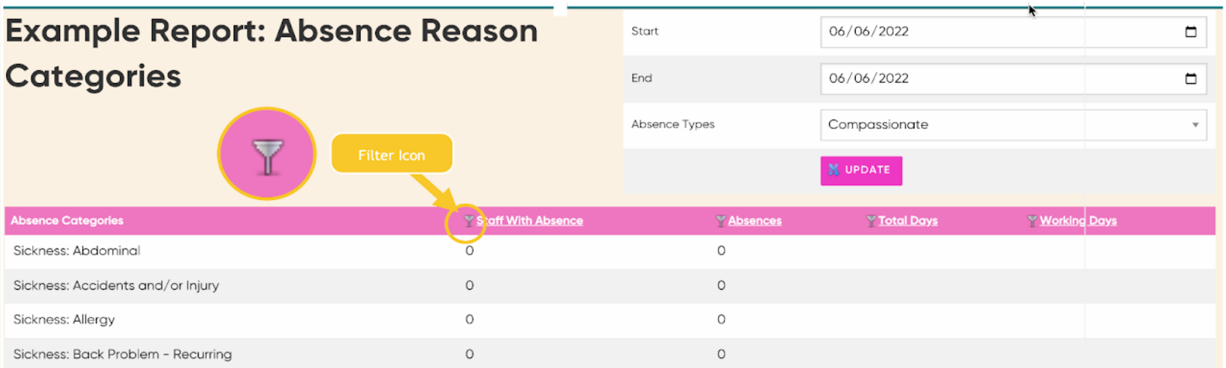

 

There are many columns already available to provide more detailed information for each report and we can add as many as you need on request. Simply email us at [support@staffsavvy.com](mailto:support@staffsavvy.com).

## 14.9. Custom Reports Filtering Options

You can filter custom reports with multiple criteria on each column allowing you to view just the relevant records. Filters are stored for your next viewing too. *To use: Find this under Reports > Manage Custom Reports > View.*

You can filter each Column that you want to include in your report. This can be done by clicking the filter icon next to each column.




You can filter by number, i.e. number of absences, to get specific information.


Filtering options available:

- Equals
- Contains
- Starts With
- Greater Than
- Less Than

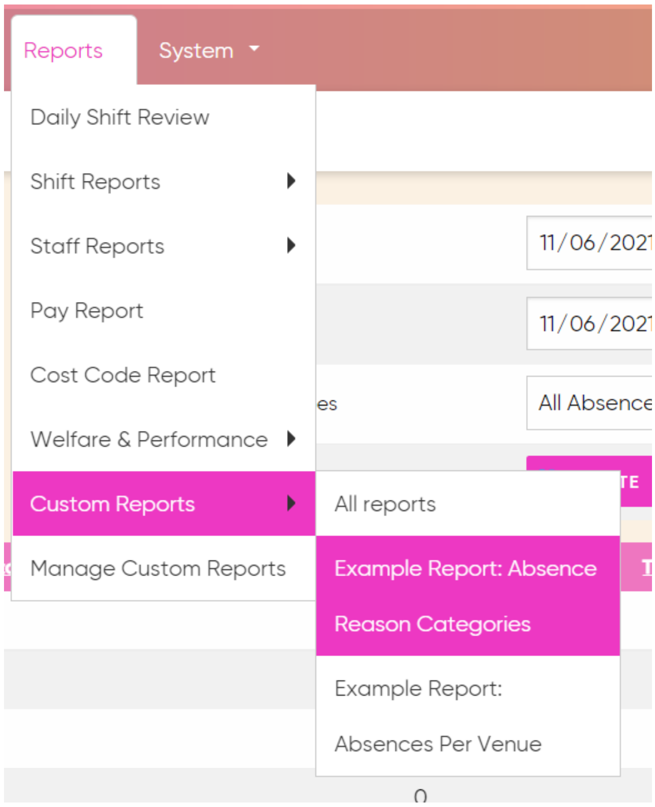
- Does Not Equal

### 14.9.1. Custom Reports Access

You can provide access to specific reports to certain access levels including line manager access.

In addition, you can mark the reports so they are shown in the main menu for quick access by yourself and others with access.

To edit who has permissions to view and allow the report to be displayed in the menu, go to the Manage Custom Reports menu.




### 14.9.2. Remote Custom Report Access

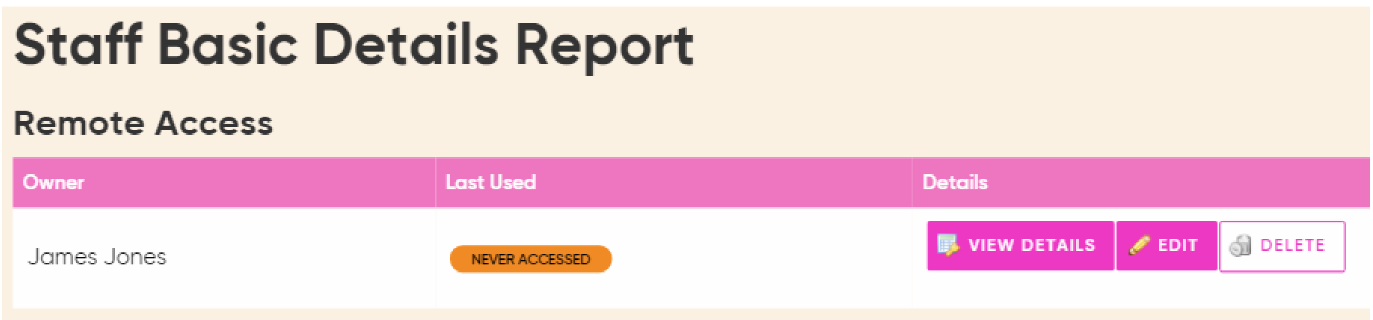
Remote access to the custom reports allows you to get access to certain data from the system and have it curated to the columns you need.

To set up remote access, you'll need to assign the permission "Custom Reports: Grant Remote API Access" to your access level, or those who need to set this access up.

Once assigned, you'll see a new option next to each custom report when editing the custom reports. This Manage API access button will display all access to the report.

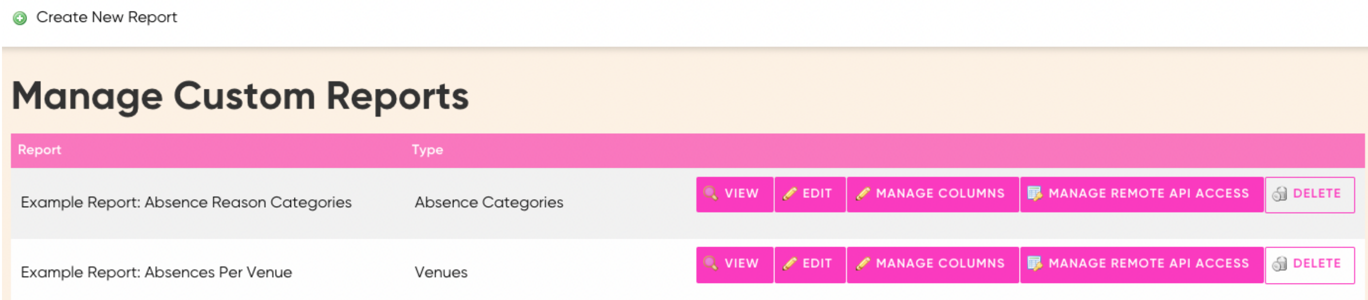
Use the option at the top to add remote access. You can stipulate an IP address or range to restrict access to.

Only the user who has created the remote access can see the access details.

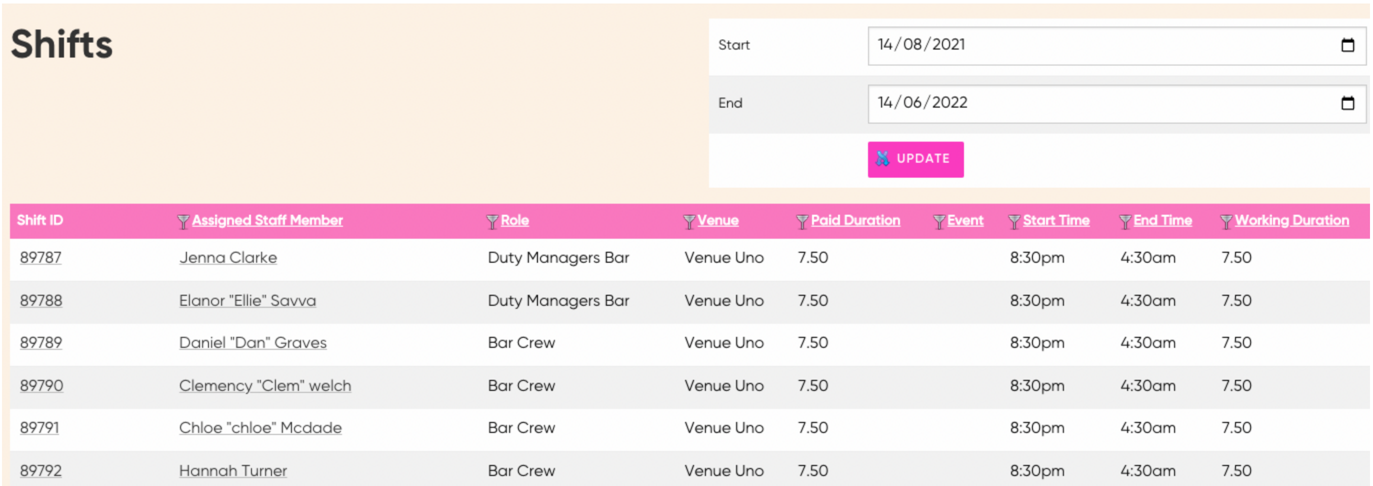


# 14.10. Run Reports on Raw Data

The creation of custom reports for shifts and time entries allows you to run reports on raw data and access these via the report API. To navigate to custom reports go to Reports > Manage Custom Reports.

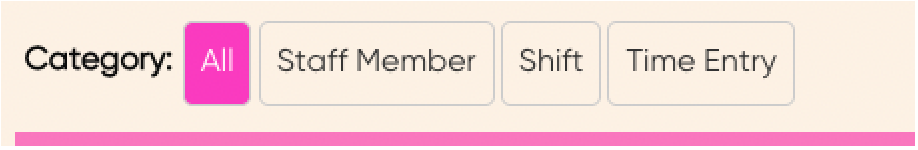


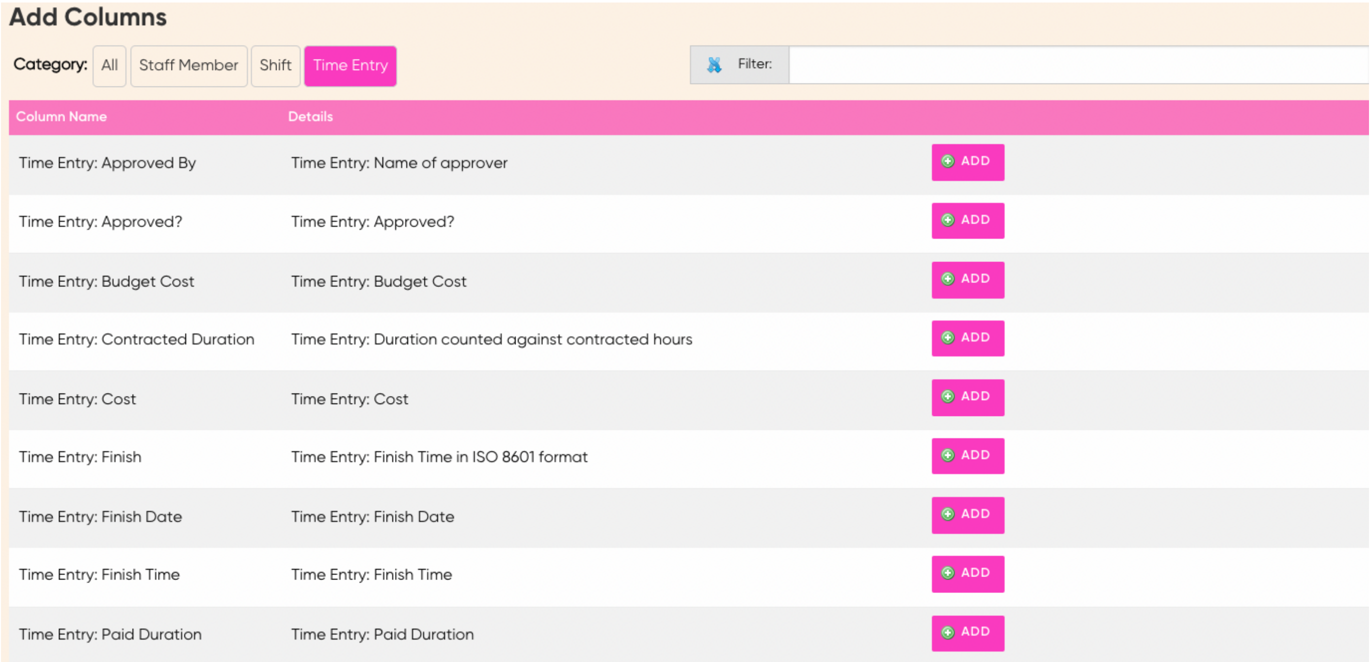

From here you can choose to edit or Create a new report. When creating a new report specify that the 'type' of report you are creating is a 'Shift' Report. From here you can add columns so that the report gives more details about the shift, i.e. role/pay/duration.




| Shift ID | Assigned Staff Member | Role | Venue | Paid Duration | Event | Start Time | End Time | Working Duration |
|---|---|---|---|---|---|---|---|---|
| 89787 | Jenna Clarke | Duty Managers Bar | Venue Uno | 7.50 | | 8:30pm | 4:30am | 7.50 |
| 89788 | Elanor "Ellie" Savva | Duty Managers Bar | Venue Uno | 7.50 | | 8:30pm | 4:30am | 7.50 |
| 89789 | Daniel "Dan" Graves | Bar Crew | Venue Uno | 7.50 | | 8:30pm | 4:30am | 7.50 |
| 89790 | Clemency "Clem" welch | Bar Crew | Venue Uno | 7.50 | | 8:30pm | 4:30am | 7.50 |
| 89791 | Chloe "chloe" Mcdade | Bar Crew | Venue Uno | 7.50 | | 8:30pm | 4:30am | 7.50 |
| 89792 | Hannah Turner | Bar Crew | Venue Uno | 7.50 | | 8:30pm | 4:30am | 7.50 |

You can filter so that you can specify categories relating specifically to 'Time Entries' or 'Shifts' and then add those as columns for the final custom report.




# 15. SSO (Single Sign On)

This brings the ability to link StaffSavvy to your identity management platform. Single Sign On via SAML allows you to force staff to securely log into your normal systems and this action grants them access to their account on StaffSavvy.

There are a few requirements:

- Accounts must exist in both systems already.
- Email addresses used within StaffSavvy must match those used within your Identity Provider.
- Your Identity Provider must support SAML and allow you to specific a custom connection.

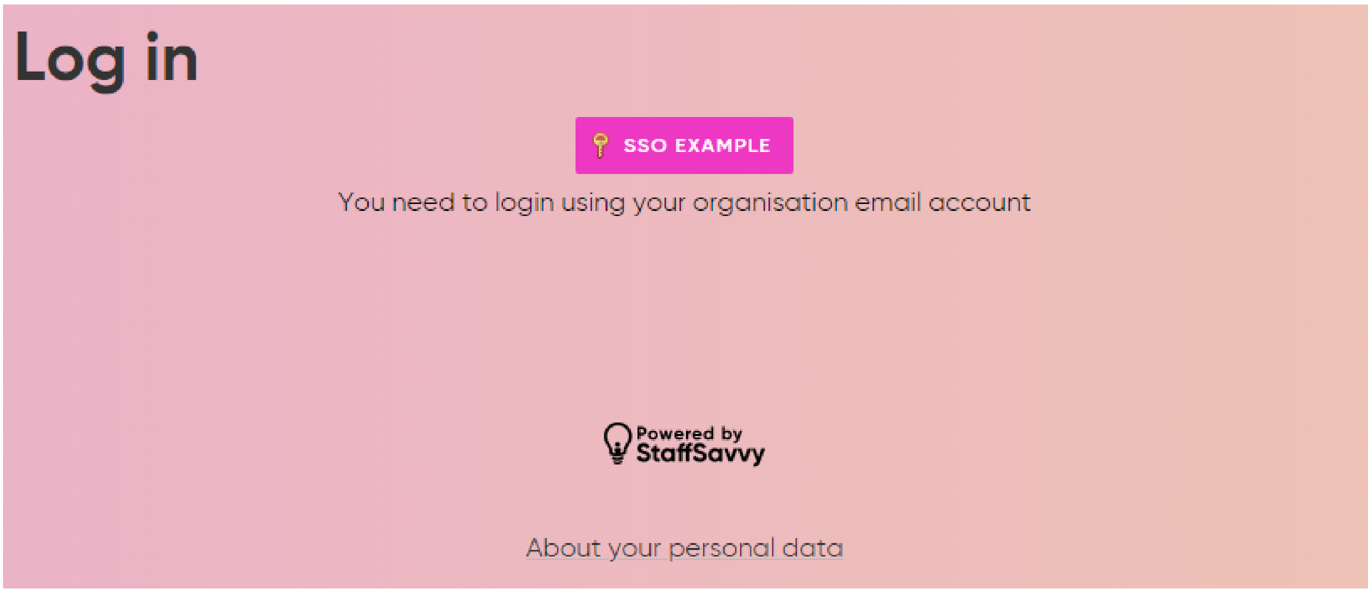
Standard instructions for the configuration of the connection are detailed below. If you have any issues, please discuss this with our support team. Please note that this is an advanced configuration option where we’re only able to support the StaffSavvy side of the integration.

1. Under the Global Settings > SSO tab, enable SAML Single Sign On
   Note: do not disable the “StaffSavvy Account Sign On” option until your connection is set up and tested successfully.
2. Complete the Identity Provider Details section.
   a. If you require self-signed x509 certificates, we recommend this free service: https://developers.onelogin.com/saml/online-tools/x509-certs/obtain-self-signed-certs.

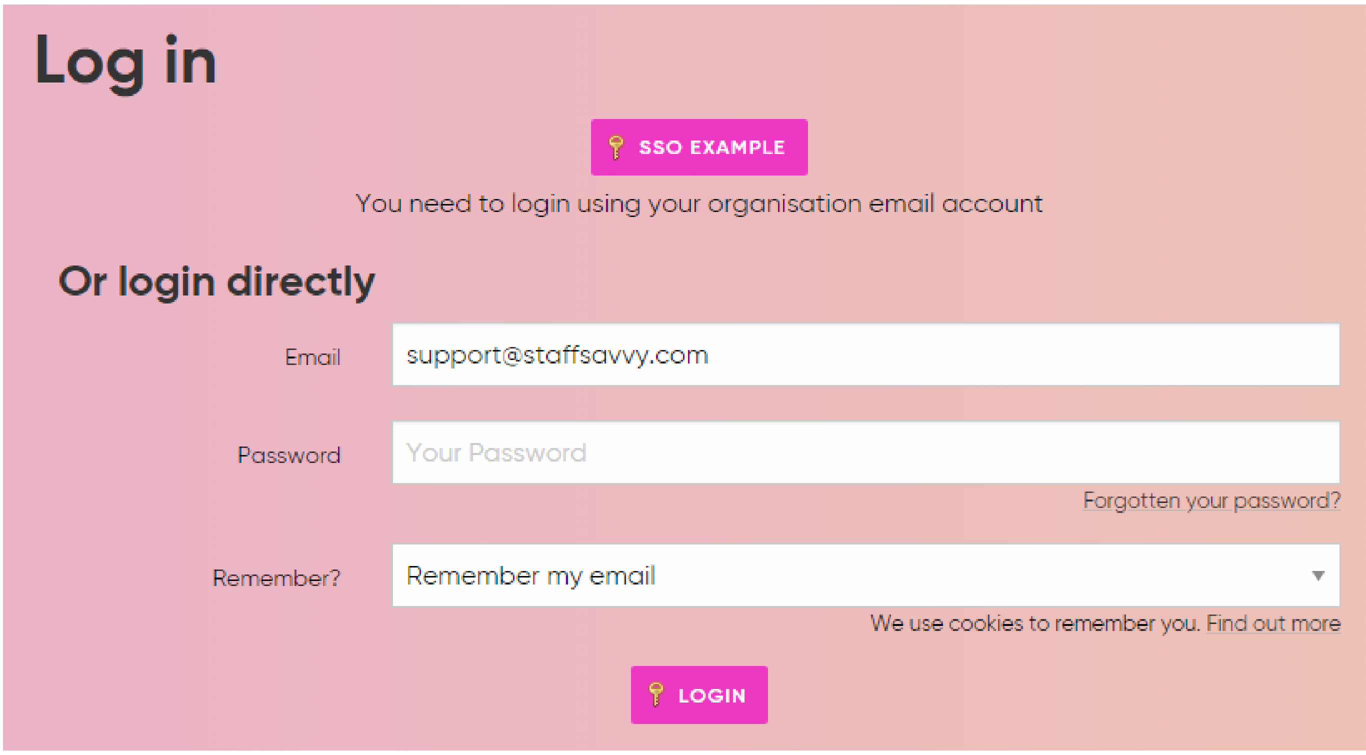
 

3. Click Save once your Identity Provider Details section is complete.
4. Complete the Login Screen section fields to ensure your staff are correctly informed of how to login and who to contact if they have any problems.
5. Download the Metadata XML as available under the SAML section.
6. Upload this Metadata file to your Identity Provider.
7. Test the connection and ensure you can log in correctly.
8. Test with connection with a sample of your staff accounts.
9. If desired, disable the StaffSavvy Account Sign On option from your SSO tab of Global Settings. This will force your SSO option to be used to log in.

StaffSavvy Login with just SSO login allowed:



Login page with optional SSO:

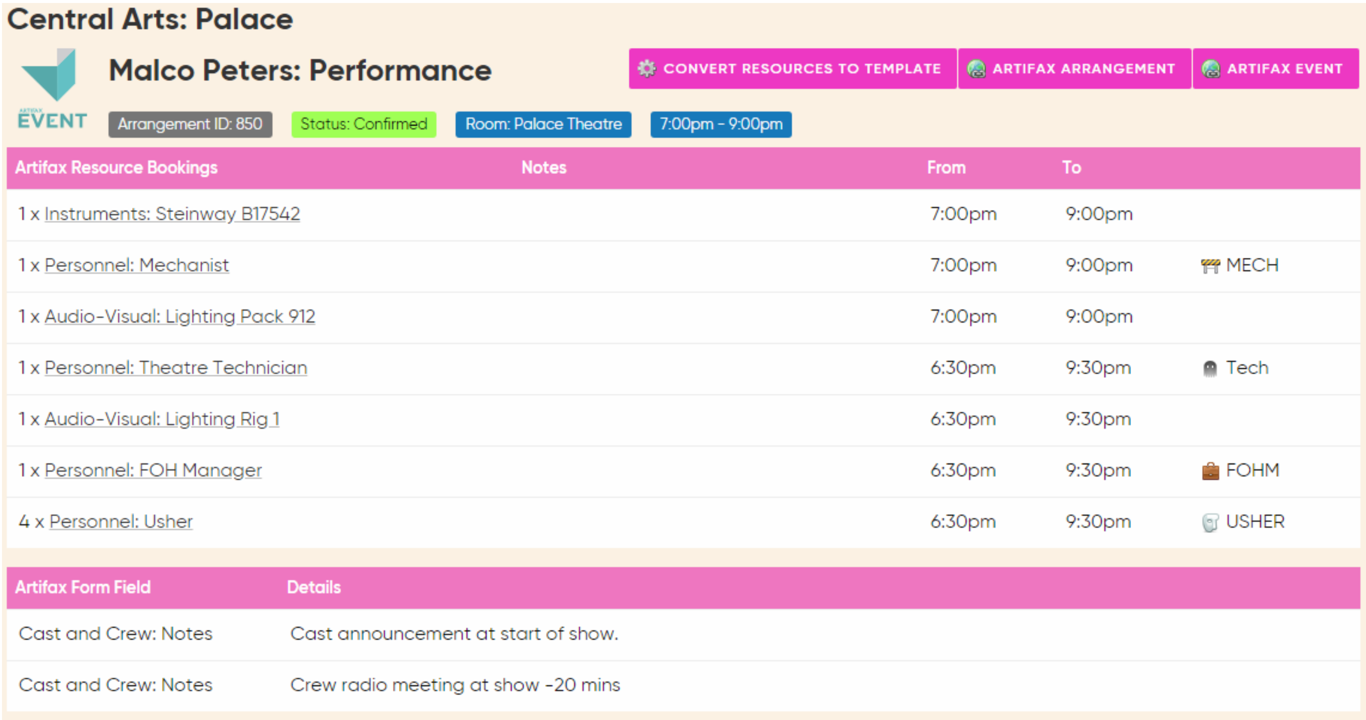


# 16. ArtifaxEvent Integration

ArtifaxEvent is a leading Venue and Event Management solution. We have collaborated with them directly to bring their event information including resource booking requests directly into StaffSavvy.

This allows managers to see all important information from Artifax directly in the schedule creation and shift management pages of StaffSavvy. This also includes details such as cost codes, custom fields and resource bookings.


Central Arts: Palace

Malco Peters: Performance

CONVERT RESOURCES TO TEMPLATE | ARTIFAX ARRANGEMENT | ARTIFAX EVENT

EVENT | Arrangement ID: 850 | Status: Confirmed | Room: Palace Theatre | 7:00pm - 9:00pm

| Artifax Resource Bookings | Notes | From | To | |
|---|---|---|---|---|
| 1 x Instruments: Steinway B17542 | | 7:00pm | 9:00pm | |
| 1 x Personnel: Mechanist | | 7:00pm | 9:00pm | MECH |
| 1 x Audio-Visual: Lighting Pack 912 | | 7:00pm | 9:00pm | |
| 1 x Personnel: Theatre Technician | | 6:30pm | 9:30pm | Tech |
| 1 x Audio-Visual: Lighting Rig 1 | | 6:30pm | 9:30pm | |
| 1 x Personnel: FOH Manager | | 6:30pm | 9:30pm | FOHM |
| 4 x Personnel: Usher | | 6:30pm | 9:30pm | USHER |

| Artifax Form Field | Details |
|---|---|
| Cast and Crew: Notes | Cast announcement at start of show. |
| Cast and Crew: Notes | Crew radio meeting at show -20 mins |

## 16.1. Integration Setup

To enable this integration, go to the Integration tab within System > Configuration > Global Settings. You will need to know your Artifax URL and you will need to have created an API key for StaffSavvy to use. Enter these details and click save.

It might take a few minutes for the sync to complete and initial data be downloaded. To confirm the sync is working, go to edit a venue. You will find an Artifax tab. There should now be a list of Artifax rooms shown.

Contact StaffSavvy support if you have any issues with this integration.

## 16.2. Loose Linking VS Direct Link

Loose linking matches shifts to scheduled events based on the start times for shifts. For example, if you have an event starting at 10am and another at 4pm, any shifts starting at 11am will be assigned to the first event and any shifts starting after 4pm will be assigned to the second event.

This method is useful for organisations who do not use ArtifaxEvent resources and/or schedule staff within the venues directly or have regular shift patterns that exist before the events are booked in. This allows staff to see the events they are working without explicitly assigning them to the events.

There is a limit of one event per hour per venue when using this linking method.

Direct Link requires staff to be assigned to an event explicitly. This is normally done by using the scheduling tool and importing the templates from ArtfiaxEvent's resources. It can also be done using the Add Shifts button which is displayed within Resources in StaffSavvy or it can also be done by choosing then explicit event when editing a single shift.

This option is useful if you have multiple events in the same venue at the same time or within the same hour (for example, different tour groups).

## 16.3. Venue Configuration

Select the rooms in Artifax that you wish to match to this venue in StaffSavvy. Multiple rooms can be shown on multiple venues.

Once chosen, update the status filter below and choose which Artifax event statuses you want to show. This allows you to ignore events not yet confirmed or cancelled.

The remaining settings allow you to choose what information is included on the page. By syncing the events to StaffSavvy's events, you will override anything already entered there. If you choose to keep the information separate then you can see the Artifax event and then enter your own title. Your title will be what is shown in reports and to staff.

You are able to pick and choose the resources and custom fields you wish to display within this venue. For custom fields, there are two sections. One for admin views of the venue when editing and creating shifts. The other set of custom fields can be set to be displayed to the staff assigned to shifts for the events. This allows you to have multiple venues importing data from the same Artifax rooms but display different parts of the information so it's always relevant. It also allows you to have different custom fields displayed for managers creating the shifts and staff working them.

StaffSavvy

### 16.3.1. Automatic Shift Detailed Notes Sync

This option allows resource booking notes in Artifax to be copied over to StaffSavvy when using the automatic schedule template creation.

## 16.4. Schedule Template Creation

Under each Role within StaffSavvy you can assign an Artifax resource so the system understands which resources match up to either other.

This allows StaffSavvy to build roster templates automatically from the requested resources booked in Artifiax. The template will be created, the correct roles assigned and the template assigned to the correct day within the schedule.

It's then just a case of making any adjustments and previewing the generated shifts.

Within the venue confirmation, you can also choose if you want the system to allocate the shifts or to create extra, unassigned or offered shifts instead.

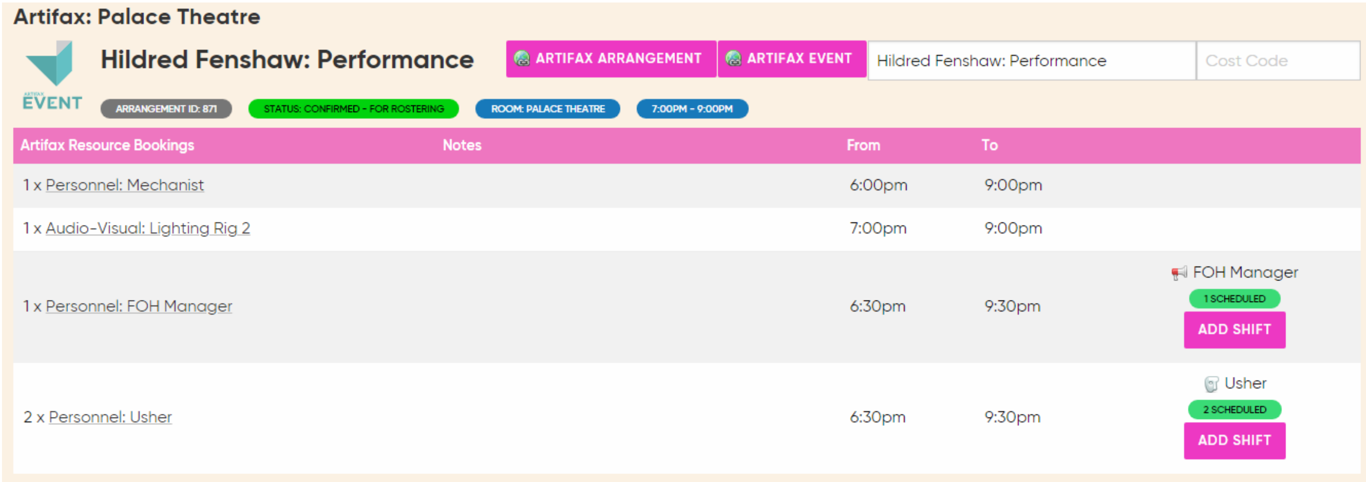
## 16.5. Resources View

On the grid view, the system will display a comparison of the Artifax resources that are scheduled compared to the StaffSavvy shifts scheduled in. We'll show when it's matching and display a warning when StaffSavvy doesn't match the booked resources.

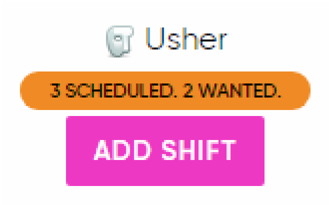
There is an Add button to the resources which easily adds a shift matching the resources into the system ready to be assigned to a staff member. It's perfect for quick additions or for teams that require careful manual management.

Below is how the resources panel looks with the green schedule notifications displayed along with the Add Shift button.




If the schedule shifts are not matching the booked resources, you'll receive a notification with the difference.




### 16.5.1. Mismatch Warning Flag

If we're using resources from ArtifaxEvent, we'll compare the bookings to the scheduled shifts and display a warning message on the grid list where you can see if there are any days that need attention.

You can then view the details page to see what doesn't match.

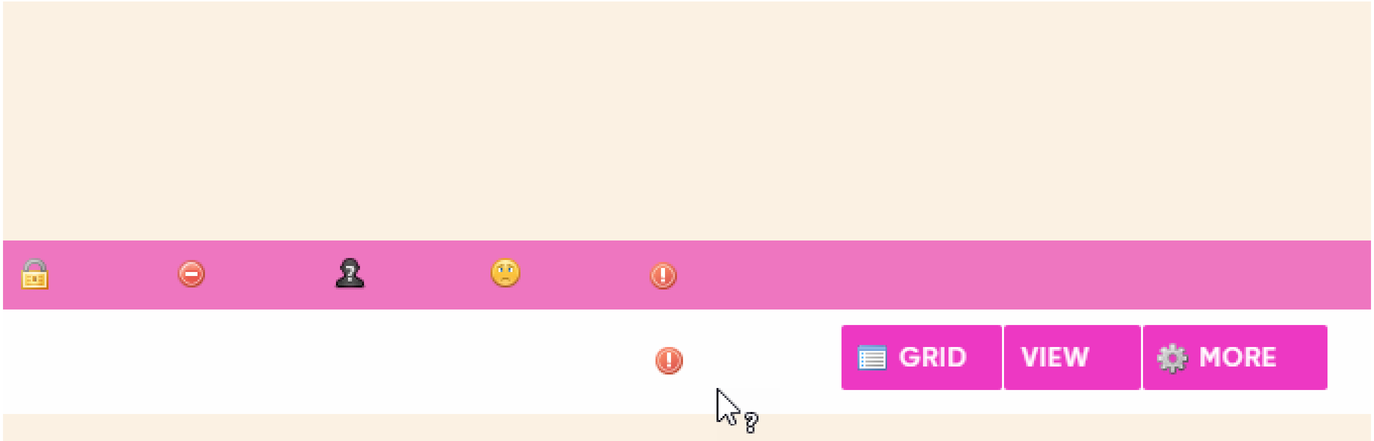
At this point, you can correct the shifts so they match or dismiss the warning. The warning will only reappear if the requirements change again in the future.

You can configure when the system will display a mismatch flag within the venue's settings for Artifax.

The options allow you to decide if hidden shifts should be counted and if unassigned shifts should be counted when matching with resources. These options mean that the flag can still be displayed if the shifts are created but not published or not assigned to staff members yet.

There is an additional option which allows you to change the assigned role of a shift while still showing the resources and shifts as being matched. This option is particularly useful if you need to schedule 5 tour guides but then nominate one of them to be a lead tour guide. This is still matching the requirement of 5 tour guides but one is also now a leader.

The matching rules are also used if you are updating the ArtifaxEvent Event's Status automatically.




## 16.6. Sync Staff Allocation Up to ArtifaxEvent

StaffSavvy allows you to push up the scheduled staff and their details back to ArtifaxEvent when using ArtifaxEvent resource bookings for staff.
This means their names and, optionally, total working length and/or costs are displayed right on the resource bookings within ArtifaxEvent.

To enable this, go to the Integration tab of the Global Settings. Find the option called "Upload Resource Allocations to ArtifaxEvent?" and choose which ArtifaxEvent Custom Field we should write the allocation of shifts to. You can also choose here the order that staff should be listed (if there are multiple staff allocated) and what information we write to ArtifaxEvent such as working duration and budget cost.

Please note that you need the latest version of ArtifaxEvent for this feature and that updates to the scheduled shifts can take a few hours to sync through between the systems.

From here there are the following options for displaying shift order.

- Start Time, First Name, Last Name.
- Start Time, Last Name, First Name.
- First Name Last Name.
- Last Name, First Name.

You also have the option to include/exclude additional information such as; shift times, work duration and budget cost.

## 16.7. ArtifaxEvent Event Status Changes

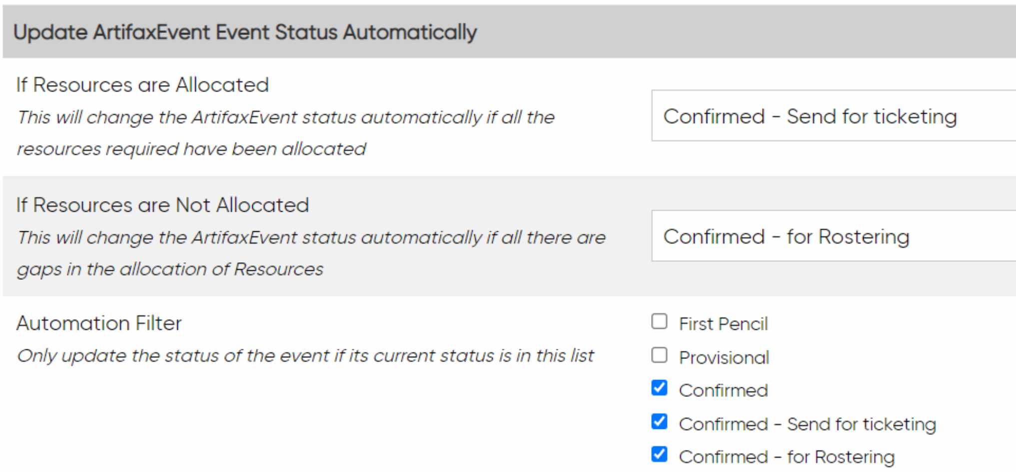
If you are using ArtifaxEvent Resources, you can have StaffSavvy automatically update ArtifaxEvent's Event Status once all resources have been allocated.

There is a limitation where only one venue can currently perform this update; if you have two venues linking to the same event then their status changes could override each other.

Configure the status change sync within global settings. You can choose which status to change the event to once resources are assigned. You can also set a status to change it to if they are mis-aligned.

You also have an automation filter; this is important so that the system will not update the status of cancelled or provisional events for you automatically.




The resource matching rules are used to decide if the event is matching the resources so you can customise how strict this matching is.

# 17. Flow Learning Integration

Flow Learning is a hugely popular training platform in the UK. This integration can automatically sync staff up to Flow and download their completed certificates directly to their account in StaffSavvy.

We can even offer them direct sign on so they can click a button within their StaffSavvy account and log straight into their Flow account. Enable this integration under the Global Settings.

To set this up go to System > Configuration > Global settings > Integrations. From here enable Flow Integrations under Flow MS.

Firstly, enable integration, then, you will need your Company ID and API secret which allows us to access and sync your Flow account.

When setting up Flow integration it is important to make sure that all staff members have a job title, otherwise Flow can not recognise them. This is because once set up, Flow will use the Job Title to recognise staff members and let them know what training they need to do. Flow will allocate tasks to staff members based on the Job Title assigned to them in the Staff Savvy system.

| Flow MS | |
|---|---|
| Integration Enabled | Enabled |
| Company ID | |
| API Secret | |
| Job Title Data Field | Job |
| Fall back to default role for job title? *If you don't have a data field for job title or if it's not set* | No (Flow cannot accept records if job title is not provided) |
| Create certificates for modules in flow? *Automatically create certificates that are completed within Flow* | No - needs to be manually linked |

Another feature available with Flow integration is that once training is completed on Flow, it is then possible to download certificates into Smart Savvy. Once the certificate code from Flow is entered the certificate will appear automatically on a Staff Member's profile.

If there is training to be completed on Flow, it will appear on a staff member's profile page under the Training & Roles tab and will take you to Flow Hospitality's login page.

# 18. SagePeople Integration

SagePeople is Sage's HR system; we've introduced a simple integration using their new V3 API which allows us to automatically pull down data from SagePeople's system.

- Automatically link staff accounts based on their email address.
- Automatically invite staff from SagePeople into StaffSavvy.
- Download booked absences in SagePeople into StaffSavvy for use with shift schedules.

Unfortunately, SagePeople does not currently support the upload of data into their system so any data you need to import back to SagePeople will need to be completed manually.

This integration can be enabled under System > Global Settings > Configurations > Integrations. You will need access to SagePeople running v3 of their API.

Once the connection is made, you can configure the data sync as required and use the Enabled option to turn on the sync as needed.

# 19. Xero Integration

The Xero integration is a API-based link that will sync staff accounts between the two systems and push the latest wage sheet time entries directly to your payroll timesheets in Xero.

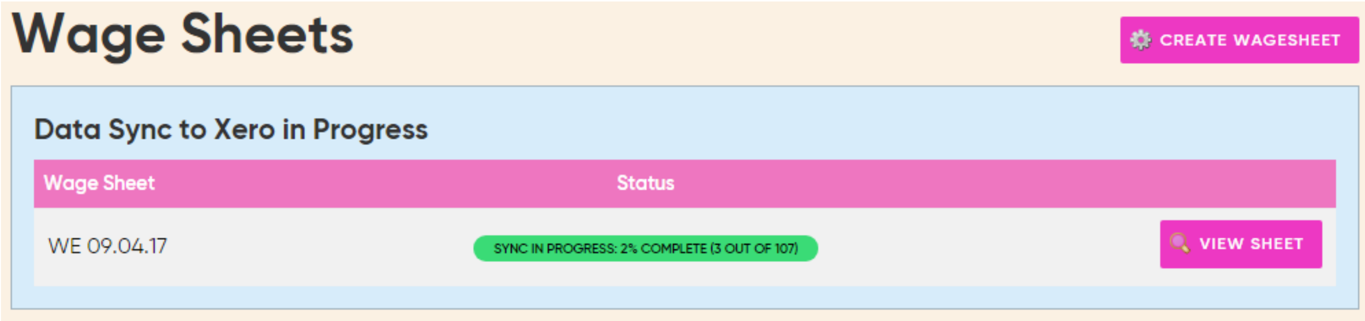
As this is a new API connection, please speak with our support team to ensure this is configured and tested correctly.

You will need to add the StaffSavvy app to your Xero system and grant the requested accesses to your system.

The integration will automatically match up StaffSavvy accounts with Xero employee accounts using their email addresses and details. Link your pay elements in StaffSavvy to your Xero pay codes and easily push paid hours directly into your Xero timesheets.

We currently support Australia, New Zealand and UK Payroll connections for Xero.




# 20. Trinet Integration

The trinet integration makes use of their API to pull data down into StaffSavvy. The connection allows both staff and absences to be linked between the two systems.

To enable the integration, you will need your company ID, client ID and API Secret key. Once that information is entered into the System > Global Settings > Configurations > Integration page then you will be able to choose options relating to the syncing of Staff and Absences.

## 20.1. Staff Sync

This is required to allow the 'absence syncing' to effectively work. Choose the Partially option as this will purely link accounts in TriNet to accounts in StaffSavvy using their email address.

## 20.2. Absence Sync

This will enable downloading of absences from Trinet into StaffSavvy. Each absence in Trinet will be recorded as a single period for a single day to mirror how Trinet handles the same information.

The system will keep track of the data it has already synced. If needed you can return to this page and request a full sync of absences anytime.

With absences, you can also tell StaffSavvy to cancel shifts automatically. Use the Shifts affected by the holiday option and choose what should happen to shifts during scheduled absences.

# 21. Stopford Integration

The Stopford integration is a basic import function within the schedule creation tool. This will take a Stopford export format and use it to create and allocate templates to different venues based on the required bookings.

Turn this option on System > Global Settings > Configurations > Integration tab. Then under Shifts > Schedule Creation > Manage Schedule page, you'll see an Import from Stopford option at the top in the Actions menu.

This will display a popup where you can choose the file to import. You'll also see two different role selection options. The first role is the primary role the system will assign. The second role selection allows you to split the staffing requirements in the Stopford file with another role.
For example, the Stopford file might stipulate 2 people at 10am. If you use the secondary role option, this will allocate 1 person with the primary role at 10am and 1 person with the secondary role at 10am.

If the file stipulates 4 people then it will be split into 2 for the primary role and 2 for the secondary role.
If the file stipulates an odd number of people, the primary role will have the additional person. For example; 5 people required will give the primary role 3 people and the secondary role will have 2 people.

The start and end time adjustments will just add additional time to the front and end of the Stopford times to allow for preparation work before the booking time and any required time after the booking is due to finish.

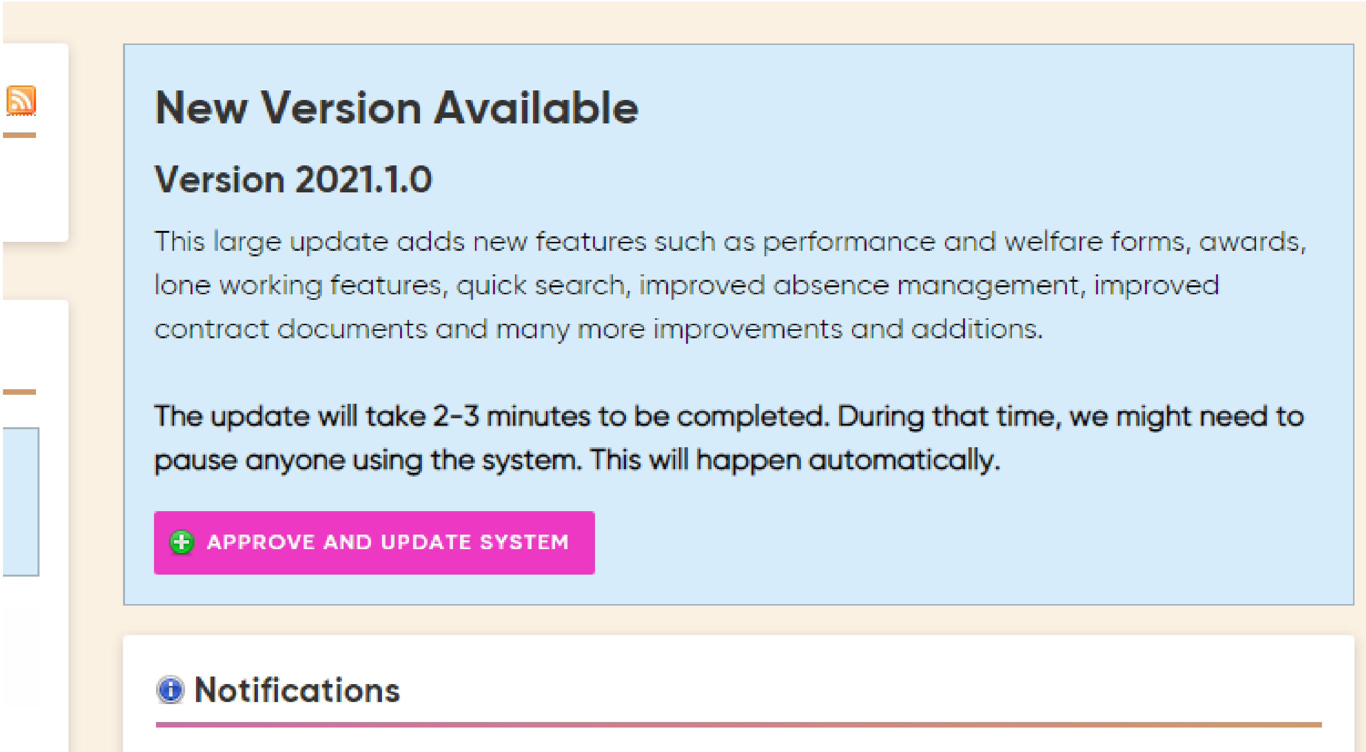
# 22. System Updates

We provide continuous small updates and improvements as part of the service. These are normally installed automatically on your system as they become available.

We also create larger upgrades; these updates include larger new features along with changes and enhancements to the existing features.

We'll notify you when an update is available directly in the system. This will be displayed to any accounts who have the Upgrade permission assigned to their access level.




We'll provide a brief description of the update and, if available, a link to view our update notes so you can see in more detail the changes and improvements the update will deliver.

You can choose a suitable day and time to update your system. Simply click the Approve and Update System button when you want this to happen.

While you can choose to delay the update for up to four weeks, we will set a fixed update date where your system is automatically updated if it hasn't been already. This will be communicated within the New Version Available notification area.

If you have any feedback, feature suggestions or require additional help then please contact us directly at support@staffsavvy.com.